Salesforce Certified Marketing Cloud Consultant Exam Study Guide: Reporting

Summary

Reporting in Marketing Cloud is your window into campaign success, representing 14% of the exam, and it's where you prove your ability to measure, analyze, and optimize marketing efforts with precision. This topic tests your mastery of tools like standard reports (e.g., Email Performance), data views (e.g., _Sent, _Open), and tracking extracts to deliver actionable insights—whether it's open rates, click-throughs, conversions, or bounces. You're not just pulling numbers; you're telling a story that ties back to client goals: Did the campaign drive sales? Did it re-engage lapsed customers? It's about turning raw data into decisions, ensuring clients understand what's working and what's not.

The exam challenges you with real-world scenarios: "How do you track a 1M-send campaign's ROI?" or "A client needs daily unsubscribe trends—how?" You'll need to navigate Email Studio's reporting suite, write SQL queries for custom data views, and configure extracts for external analysis—all while troubleshooting gaps or anomalies. Beyond basics, you'll handle advanced needs—multi-channel metrics, compliance audits, or predictive analytics with Einstein. This guide goes deep, offering step-by-step guidance, advanced techniques, and practical frameworks to ensure you're ready for any reporting question. From dashboards to custom SQL, you'll master the art of insight generation.

Key Concepts

- **Standard Reports**: Pre-built tools for quick campaign metrics—opens, clicks, bounces.

- **Data Views**: System tables (e.g., _Click, _Bounce) for custom SQL analysis.

- **Tracking Extracts**: Exporting data (e.g., sends, opens) to external systems.

- **Dashboards**: Visual summaries of performance—real-time or scheduled.

- **Performance Analysis**: Linking metrics to goals—engagement, revenue, retention.

Detailed Bullet Points

Standard Reports

- Access in Email Studio > Tracking—e.g., "Email Performance" for sends, opens, clicks.

- Run Account Send Summary—total sends, deliveries across all BUs, daily/weekly/monthly.

- Use Email Performance report—breaks down by job: sent, delivered, opened, clicked, bounced.

- Filter by date—e.g., "Last 30 Days"—narrows to campaign windows.

- Drill into Job Details—e.g., JobID 12345: 10k sent, 8k delivered, 2k opens.

- Export to CSV—share with clients or analyze in Excel.

- Compare campaigns—e.g., "Promo A: 25% open" vs. "Promo B: 20%"—spot trends.

- Check Subscriber Engagement—opens/clicks by individual over time.

- Test report accuracy—send 100 emails, confirm metrics match.

- Document usage: "Email Performance: Daily check, exported weekly."

Data Views

- Query system tables—e.g., _Sent, _Open, _Click, _Bounce—via SQL in Automation Studio.

- Use _Subscribers—SubscriberKey, Email, Status (Active, Unsubscribed)—for base data.

- Join views—e.g., _Sent + _Open—tracks who opened each send.

- Filter by time—e.g., WHERE SendDate >= DATEADD(day, -7, GETDATE())—last week's data.

- Aggregate metrics—e.g., SELECT COUNT(*) as Opens FROM _Open GROUP BY JobID.

- Export results—new Data Extension (e.g., "Weekly_Opens") for reporting or journeys.

- Test queries—run in Query Studio, check 10 rows match expectations.

- Monitor retention—6 months default; plan extracts for longer history.

- Handle duplicates—_Click logs every click; use DISTINCT for uniques.

- Document SQL: "_Sent + _Click: Click-through by campaign, daily."

Tracking Extracts

- Configure in Setup > Data Management > Tracking Extracts—e.g., "Send," "Click," "Open."

- Export to FTP—CSV files for external tools (e.g., Tableau, Power BI).

- Include fields—e.g., SubscriberKey, SendID, EventDate, URL (for clicks).

- Schedule via Automation Studio—e.g., nightly at 3 AM, pulls last 24h data.

- Combine extracts—e.g., "Send" + "Click" for full journey tracking.

- Test extract—run manually, check FTP file: 10k rows, no blanks.

- Secure FTP—use SFTP, encrypt sensitive fields (e.g., Email).

- Monitor file size—1M sends = ~50MB; split big jobs.

- Validate counts—match Email Performance report to avoid discrepancies.

- Document: "Nightly Send Extract: FTP to analytics.team.com."

Dashboards

- Build in Analytics Builder—drag widgets (e.g., "Open Rate," "Clicks by Day").

- Source from reports—e.g., Email Performance feeds "Sends Last 7 Days."

- Add filters—e.g., "BU = NorthAmerica"—focuses metrics.

- Schedule emails—daily PDF to client at 8 AM—keeps them updated.

- Use real-time—e.g., "Today's Sends" widget—tracks live campaigns.

- Customize for goals—e.g., "Conversions" bar chart tied to pixel data.

- Test visuals—resize, confirm data loads (e.g., 5k opens bar).

- Share via URL—secure link for team access, no login needed.

- Limit widgets—10 max; too many slow loading.

- Document: "Dashboard: Open/Click trends, emailed daily."

Performance Analysis

- Tie to goals—e.g., "10% click rate = success" vs. actual 12%.

- Calculate ROI—e.g., 50k sends, 5k clicks, 500 sales at $100 = $50k revenue.

- Track trends—e.g., opens drop 5% weekly—flag deliverability issues.

- Segment performance—e.g., "VIPs: 30% open" vs. "Inactives: 10%."

- Use A/B test results—e.g., Subject A wins at 25% open—roll out.

- Monitor bounces—hard >2% means list issues; soft >5% signals content flags.

- Analyze by channel—email vs. SMS—e.g., SMS clicks 40%, email 15%.

- Test attribution—web pixel confirms 1k sales from email link.

- Compare BUs—e.g., "Europe: 20% open" vs. "Asia: 15%"—adjust tactics.

- Document insights: "Q1: 18% avg open, VIPs lead at 25%."

Table: Reporting Tools Comparison

Tool	Purpose	Data Source	Use Case	Output	Setup Effort
Standard Reports	Quick campaign metrics	Email sends	Daily checks	CSV, on-screen	Low—prebuilt
Data Views	Custom analysis	System tables	Deep dives	Data Extension	Medium—SQL needed
Tracking Extracts	External reporting	Send events	BI integration	FTP files	Medium—config + automation
Dashboards	Visual summaries	Reports, extracts	Client updates	PDF, live view	Low—drag-and-drop
Einstein Analytics	Predictive insights	All data	Long-term trends	Charts, forecasts	High—setup + cost

This table maps your reporting options. Standard Reports are fast but basic; Data Views unlock customization with SQL. Extracts feed external tools; Dashboards impress clients. Einstein's the premium play—predictive but pricey. The exam might ask: "Custom click report—how?" (Answer: SQL on _Click data view.)

Comparison: Metrics Tracking Methods

Method	Metrics	Pros	Cons	Example	Best Practice
Email Performance	Sends, opens, clicks	Easy, built-in	No segmentation	"Job 123: 20% open"	Daily snapshot
SQL Data	Custom (e.g.,	Flexible,	SQL skills	"Clicks by link	Test queries

Method	Metrics	Pros	Cons	Example	Best Practice
Views	clicks by URL)	detailed	needed	last 7d"	first
Tracking Extracts	All events	External analysis	File management	"All sends to BI"	Automate nightly
Journey Reports	Entry, exit, goal	Journey-specific	Limited to journey	"Welcome: 15% goal"	Tie to goals
Web Analytics	Conversions	Ties to revenue	Setup (pixel)	"$10k from email"	Validate with sends

Metrics vary by tool. Email Performance is your quick hit; SQL dives deep. Extracts scale outward; Journey Reports focus inward. Web ties it to dollars. Exam question: "Track conversions—how?" (Answer: Web pixel + Journey Report.)

Case Study: Retail Campaign Analysis

Scenario

A retailer runs a 500k-email Black Friday campaign across three BUs (NorthAmerica, Europe, Asia). Goals: 25% open rate, 10% click rate, 5% conversion rate ($50 avg sale). They need daily reports and a final ROI analysis by December 1.

Reporting Process

- **Assessment**:

    o Data: 500k sends, tracked in Email Studio, web pixel for sales.

    o Goals: 25% open (125k), 10% click (50k), 5% conversion (25k sales, $1.25M).

    o Needs: Daily updates, BU breakdown, final ROI.

- **Solution**:

    o **Standard Reports**:

        ▪ Email Performance: Run daily—e.g., Day 1: 480k delivered, 120k opens (25%), 48k clicks (10%).

        ▪ Filter by BU: NorthAmerica (200k), Europe (150k), Asia (150k).

    o **Data Views**:

- SQL: SELECT s.JobID, s.SubscriberKey, o.EventDate FROM _Sent s LEFT JOIN _Open o ON s.SubscriberKey = o.SubscriberKey WHERE s.SendDate >= DATEADD(day, -1, GETDATE())
- Output: "Daily_Opens" DE—tracks opens by subscriber, BU.

- o **Tracking Extracts**:
  - Configure: "Send," "Open," "Click" extracts—FTP nightly.
  - Fields: SubscriberKey, JobID, EventDate, URL—feeds client's Power BI.

- o **Dashboards**:
  - Build: "Black Friday Dashboard"—Open Rate (bar), Clicks by Day (line).
  - Email: PDF to client daily at 8 AM—e.g., "Day 2: 26% open."

- o **Performance Analysis**:
  - Web pixel: 28k conversions by Dec 1—$1.4M revenue.
  - ROI: $1.4M - $50k (send cost) = $1.35M profit.

Implementation

- **Steps**:
  - Run Email Performance—export CSV daily, split by BU.
  - Automation Studio: SQL query → "Daily_Opens" DE → Extract to FTP—nightly at 3 AM.
  - Dashboard: Add widgets, test load—5k opens display instantly.
  - Validate: Day 1 report matches extract (120k opens).

- **Validation**:
  - Day 3: 130k opens (27%), 52k clicks (10.8%), 3k sales—on track.
  - BU split: NorthAmerica 30% open, Europe 25%, Asia 22%—adjust Asia tactics.

Outcome

- Final: 26% open (130k), 11% click (55k), 5.6% conversion (28k, $1.4M)—beats goals.

- ROI: $1.35M profit—client thrilled, ups budget for Q1.

- Daily reports—caught Asia's low opens early, tweaked subject lines.

Lessons Learned

- SQL join—missed _Sent filter, doubled rows; fixed with WHERE.

- Extract lag—FTP delay missed 1 day; tightened schedule.

- Dashboard—client wanted sales added; updated post-launch.

Advanced Topics

Multi-Channel Reporting

- **Setup**: Email (_Click), SMS (MobileConnect logs), Push (Push logs).

- **SQL**: SELECT SubscriberKey, 'Email' as Channel FROM _Click UNION SELECT SubscriberKey, 'SMS' FROM MobileSent.

- **Benefit**: 360° view—e.g., SMS 40% click vs. Email 15%.

Einstein Analytics

- **Use**: Predict open rates—e.g., "Next send: 28% likely."

- **Setup**: Feed 6+ months data—sends, opens, clicks.

- **Edge**: Forecasts trends—e.g., "Q1 dip unless VIPs targeted."

Compliance Audits

- **Track**: Unsubscribes (_Unsubscribe), bounces (_Bounce)—export quarterly.

- **SQL**: SELECT SubscriberKey, EventDate FROM _Unsubscribe WHERE EventDate >= DATEADD(month, -3, GETDATE()).

- **Prove**: CAN-SPAM—0 sends post-unsub, logs ready.

Custom Metrics

- **Example**: "Engagement Score" = (Opens x 1) + (Clicks x 3).

- **SQL**: SELECT SubscriberKey, (COUNT(o.EventDate) * 1) + (COUNT(c.EventDate) * 3) as Score FROM _Sent s LEFT JOIN _Open o ON s.SubscriberKey = o.SubscriberKey LEFT JOIN _Click c ON s.SubscriberKey = c.SubscriberKey GROUP BY SubscriberKey.

- **Use**: Prioritize high scorers—e.g., Score > 10 gets VIP offer.

Practical Frameworks

Daily Reporting Workflow

1. Run Email Performance—export CSV by BU.

2. Query Data Views—"Daily_Opens," "Daily_Clicks" DEs.

3. Extract to FTP—send stats for BI.

4. Update Dashboard—email PDF to client.

5. Log: "Day 1: 25% open, 10% click—on target."

ROI Analysis Guide

1. Gather: Sends (report), clicks (extract), sales (pixel).

2. Calculate: Revenue - Cost = Profit—e.g., $1.4M - $50k.

3. Segment: By BU, campaign—e.g., NorthAmerica $600k.

4. Report: "ROI: $1.35M, 5.6% conversion—exceeds 5%."

5. Optimize: Boost winners—e.g., NorthAmerica subject lines.

Troubleshooting Guide

- **Opens Missing**: Tracking off—re-enable in Setup.

- **Extract Empty**: Config wrong—check fields, rerun.

- **Dashboard Blank**: Data lag—refresh source report.

- **Sales Low**: Pixel off—test link, redeploy.

Practice Questions

1. **Client needs daily open rates—how?**

   o Answer: Email Performance report, scheduled Dashboard email.

2. **Track clicks by URL last 30 days—where?**

   o Answer: SQL on _Click: SELECT URL, COUNT(*) FROM _Click WHERE EventDate >= DATEADD(day, -30, GETDATE()) GROUP BY URL.

3. **Export sends to BI—how?**

- o Answer: Tracking Extract, Automation Studio to FTP.

Best Practices

- **Automate**: Daily extracts—don't pull manually.

- **Validate**: Cross-check reports vs. extracts—catch errors.

- **Simplify**: 5 key metrics—e.g., open, click—not 20.

- **Visualize**: Dashboards for clients—numbers bore.

- **Document**: Every query, extract—replicate easily.

Real-World Application

A nonprofit tracks a fundraiser:

- Reports: 100k sends, 30% open, 15% click—Email Performance.

- SQL: Donors last 90 days—targets $500+ givers.

- Extract: Clicks to CRM—ties to $200k donations.

- Result: 20% lift vs. last year—reporting drives strategy.