

Steps	Click Track	Talk Track	Value Highlights	Comments
<b>PREPARATION - OPTIONAL</b>	Navigate to Admin panel (gear icon) and: <ol style="list-style-type: none"> <li>1. Pre-define a relationship</li> <li>2. Pre-define a data set (e.g. Customers with matching Orders)</li> <li>3. Pre-define a filter set (e.g. customers above 18 years old in France)</li> <li>4. Create a shared custom value (e.g. dynamic salutation based on Gender)</li> <li>5. Create picklist values for fields like Gender</li> </ol>		Admins can pre-define relationships, data sets, filter sets, custom values, picklists, and even entire selections as templates, to reduce the risk of errors and speed up the process of segmentation in Marketing Cloud.	- If you <u>have</u> time to prepare your demo in advance, you can recreate some of their DE's to simulate a legacy query in DESelect. Additionally, you can pre-build datasets, filter sets, and/or custom values, to highlight some of the admin features of DESelect Segment.  - If you <u>don't have</u> time to prepare your demo in advance, you can still tailor the live demo by selecting either B2C DE's (contacts, orders, etc) or B2B DE's (accounts, opportunities, etc), and adapting your talk track accordingly.
<b>Open App</b>	<ol style="list-style-type: none"> <li>1. Click on App Launcher</li> <li>2. Open DESelect Segment</li> </ol>	Today, I will show you how DESelect helps marketers to personalize their campaigns with drag-and-drop segments, and ultimately drive more revenue. We will see the 3 steps a marketer follows, to segment in Marketing Cloud without SQL code. Let's get started!  As we can see, we access DESelect directly in Marketing Cloud so Marketeers don't need switch solutions and can segment on the same platform they execute their campaigns.		
<b>Home Screen walkthrough</b>		<ol style="list-style-type: none"> <li>1. At the top, you see (Left to Right): The buttons for standard selections and waterfall selections, a search bar, a button for a tailored calendar view, and a button to create a new Segmentation - which we call "Selection"</li> <li>2. Below, you'll see the folder structure on the left, and the selections on the right with a few details such as status, record count, and created by.</li> <li>3. On the bottom right you have the settings wheel to navigate to the admin panel, as well as a button for support. When you click on the penguin, you can even vote for new features to be added to our product roadmap.</li> </ol>	Waterfall selections can be used for data sources with millions and millions of records, to sequence the data sources or filters, and avoid session time-outs.	
<b>Create New Segment</b>	<ol style="list-style-type: none"> <li>1. Click New Selection</li> <li>2. Provide a name for the new selection</li> </ol>	We can create a new Selection from template or from scratch. Let's create one from scratch.		
<b>New Selection walkthrough</b>		<ol style="list-style-type: none"> <li>1. We can see 3 easy steps to create our audience in a new Selection: Step 1 - Selection Criteria, where we define our data sources and filters, Step 2- Target Definition, where we define the fields for our Target Data Extension, and Step 3- Preview, to preview our results before actually populating our Target Data Extension.</li> <li>2. You'll also see buttons on the top right to add a description, schedule this Selection query once or repeatedly, save the Selection, run the Selection, or return to Home screen.</li> <li>3. Below, you'll see. the canvas to select your data sources, and define your filters.</li> </ol>	By running a preview, users can see the expected results and go back to make changes if necessary, before actually populating the Target Data Extension.	In SQL: - Selected Data Extensions = "FROM" statement - Filters = "WHERE" statement - Step 2: Target Definition = "SELECT" statement
<b>Add Data Sources</b>	<ol style="list-style-type: none"> <li>1. Search for Customer DE and drag it to the right. Optionally rename it.</li> <li>2. Type "_open" to show data views</li> <li>3. Add the Orders DE and drag it on top of the Customer DE to the right. By default, the system will select Customers WITH MATCHING Orders.</li> <li>4. Change the relationship to a different join, to indicate that the Venn diagrams automatically visualize the type of JOIN</li> </ol>	<ol style="list-style-type: none"> <li>1. You can find any type of DE in your org - if you have the permission to access it.</li> <li>2. You can also access data views.</li> <li>3. To combine different DE's, which can be challenging with standard filters, simply drag the DE on top of the other one to define the JOIN relationship.</li> <li>4. The solution can handle any type of JOIN that you're used to using in SQL; inner join, outer join, cross join, left join, right join etc.</li> </ol>	Mention you can use standard, shared, synchronized DEs, as well as data views	Notice the "Data Sets" and "Filter Sets" subtab: this is for admins to pre-define data relations and filter combinations, to make the life of marketers even easier. Another option to limit errors is by using Templates.
<b>Create Filters</b>	<ol style="list-style-type: none"> <li>1. Drag the Birthday field to the right, click on "before" to show the operator options and click on "relative". Change it to 18 years ago.</li> <li>2. Drag the Total Amount field to the right and change to "Greater Than 10"</li> <li>3. Drag the Order Date field to the right, and change to "Between 1/01/2019 and 1/01/2023"</li> <li>4. Click on the "+" on the right side of "Total Amount" and "Order Date" and change the operator (left) to "OR"</li> <li>5. On top, click on Step 2: Target Definition</li> </ol>	<ol style="list-style-type: none"> <li>1. We support almost all filter operators you can imagine, and they update based on the field type. For date fields, users can select a calendar input or a relative input. Let's try the relative input for the Birthday field.</li> <li>2. We add filters for Total Amount and Order Date</li> <li>3. We can also create nested filters, by clicking on the "+" symbols. We can do this as many times as makes sense.</li> </ol>		

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<b>Create Target Data Extension</b>	<ol style="list-style-type: none"> <li>1. Click on Create Target DE</li> <li>2. Give a name and Save</li> </ol>	Users can select an existing Target DE, or create a new one on the fly.	In SQL, users need to have the Target DE created before writing the query, which is not a great user experience.	
<b>Define Fields for Target DE</b>	<ol style="list-style-type: none"> <li>1. Click on "Expand All"</li> <li>2. On the Customer DE, click on "Add all fields" and Confirm.</li> <li>3. On the Order DE, drag the Total Amount field to the right</li> <li>4. In the Custom Values section, click on "Add new value" and talk about the different options. Select Fixed Value, name it "Campaign Name" and add the text value "Summer Campaign" before saving.</li> <li>5. Drag the custom value Campaign Name to the right.</li> </ol>	<ol style="list-style-type: none"> <li>1. Users can easily add all the fields from a data source, selected in Step 1.</li> <li>2. Users can also add individual fields from a data source.</li> <li>3. Users can create new custom values; fixed values, dynamic values and even formulas or aggregations. Let's create a simple custom value together.</li> <li>4. Custom values can also be shared to other users</li> </ol>		
<b>Show additional functionalities</b>	<ol style="list-style-type: none"> <li>1. On top, click on "Save Data Extension" and confirm with "Create".</li> <li>2. Once the gear wheel becomes visible, on the top right of the Target Data Extension fields, click on it.</li> <li>3. Hover over "sort and limit" and "prio deduplication"</li> <li>4. On top, click on Step 3- Preview</li> </ol>	<ol style="list-style-type: none"> <li>1. After saving the Target DE, users have additional functionality at their disposal to improve the data in their Target DE, such as Sort &amp; Limit to only display e.g. the top 10% highest orders, or Prio Deduplication.</li> <li>2. Imagine creating an audience that has ordered in the past. You wouldn't want to have duplicates, in case a user has ordered multiple times. For this scenario, users can use the "prio deduplication feature" which allows you to define fields -and even advanced rules- to deduplicate data in your Target DE.</li> </ol>		If you made a mistake in the Target Data Extension, click on the gear icon (top right, after saving the Target DE) and click on "Edit Target Data Extension"
<b>Run Preview</b>	<ol style="list-style-type: none"> <li>1. Once in the Preview tab, click on Run Preview</li> <li>2. Click on "View SQL query"</li> </ol>	<ol style="list-style-type: none"> <li>1. We preview the query we just created, and it will show us the total record count, and a preview of the first 20 records. This gives users a good indication of their segmented data so -if necessary- they can go back to step 1 or step 2 to make adjustments before running the new segment (on the top right, next to the home button). As long as you don't Run your selection, the Target DE will not be populated, so it easily allows for adjustments.</li> <li>2. While the preview runs, a url with "view SQL query" becomes visible under the "Running Preview" button. This allows our technical experts to preview our Selection in SQL format. It helps technical users to become comfortable with this improved solution for segmenting SFMC data.</li> </ol>		If Prio Deduplication is applied, a users will see the record count before and after the deduplication.
<b>Next Steps</b>	Hover over the top right buttons: Schedule, Save, Run. After selecting one of them, click on "Home".	On the top right, we would now use the Buttons to schedule, save or run this Selection.		