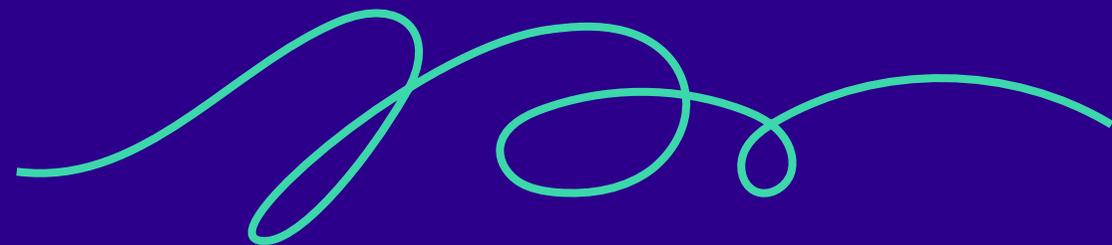




# Customer-centric marketing with Salesforce Marketing Cloud

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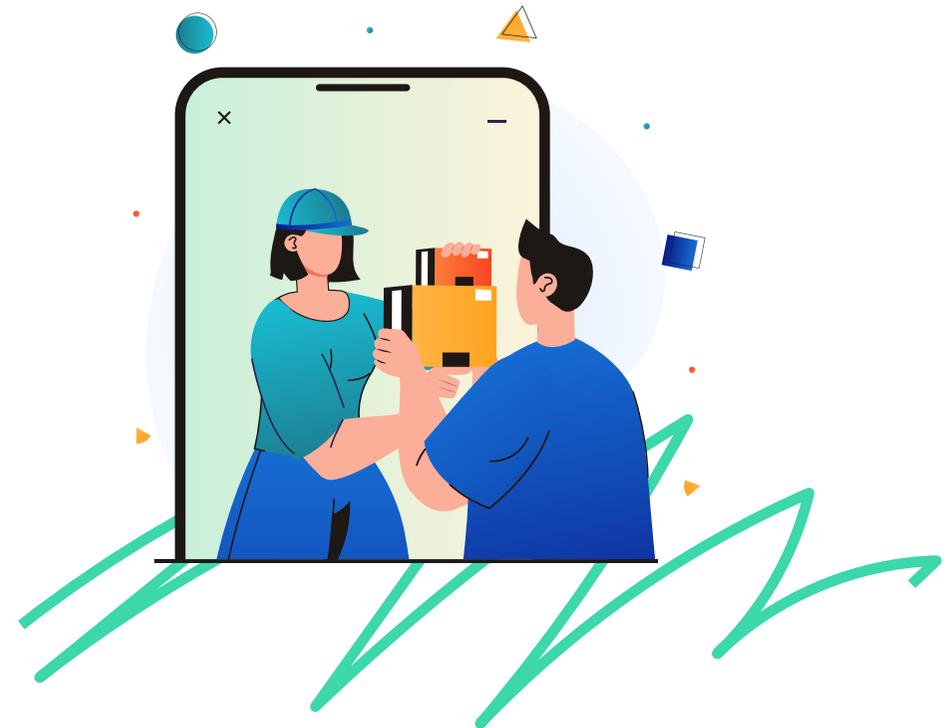


# Introduction

Cooped up inside homes during the pandemic, people had to switch to online alternatives for most life activities, recreational or otherwise. Today, consumers are not just shopping online, they are studying online, attending webinars, and even virtual concerts. As consumers spend more and more time online, they create an unmissable opportunity for marketers. To grab this opportunity, it is imperative that organizations shift to a digital-first approach. And as they move forward on their digital journey, they must cover all critical dimensions such as branding, communications, marketing, and user experience.

In the US alone, 75% of people tried new online stores or brands during the pandemic, and around 60% plan to continue using these brands in the post-pandemic world. That opens up a vast market for organizations that can tap these customers and make them brand loyalists in the long run. Most organizations identify the opportunity associated with digital-first approach.

**According to Salesforce, 68% of customers say they'll continue to buy essential goods online after the pandemic. But the success of business organizations hinges on a solid online presence and a focused digital marketing strategy that puts customers first by providing a seamless, omnichannel, and hyper-personalized experience.**



Through this e-book, we try to answer how an organization can achieve targeted communications and drive omnichannel, personalized, and customer-centric marketing with Salesforce Marketing Cloud.



# What is Salesforce Marketing Cloud?



Salesforce Marketing Cloud is a leading digital marketing automation platform that helps process vast amounts of customer data collected from various touchpoints. It allows data segmentation and analysis to create a seamless and personalized experience for the customer. Salesforce Marketing Cloud suite comes with multiple solutions that address all the marketing needs of an organization.



## Marketing Cloud Engagement powered by Email, Messaging, and Journeys

Build customer journeys across channels to deliver the right message at the right time and on the right channel to ensure a pleasant omnichannel customer experience.



## Marketing Cloud Customer Data Platform - an enterprise CDP of Salesforce

Build single-source of truth by capturing data and unifying it from anywhere. Segment and activate data across channels.



## Marketing Cloud Personalization powered by Interaction Studio

Monitor and deliver real-time website and app personalization, and manage interactions in real-time.



## Marketing Cloud Advertising powered by Advertising Studio

Build and activate audience across ad networks like Facebook, Google, Instagram, LinkedIn, and Twitter.



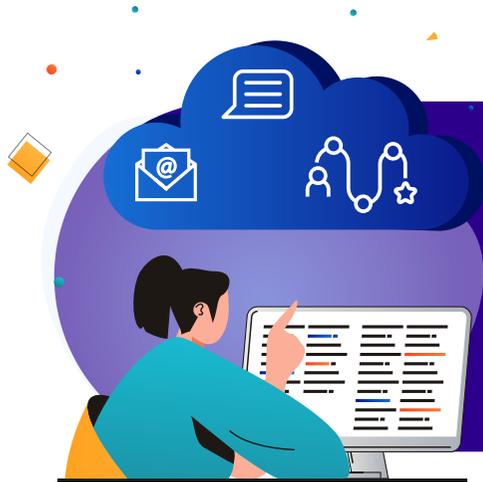
## Marketing Cloud Intelligence powered by Datorama

One-stop solution for marketing reporting, visualization and measurement while driving optimization.





# Marketing Cloud Engagement powered by Email, Messaging, and Journeys



Providing a personalized experience across channels and engaging customers with the right message at the right time through the right channel is complex. For marketers to be successful in this aspect, they need to understand how to engage and deliver experiences based on customers preferences.

## How can Marketing Cloud Engagement help?

- It connects different systems and touchpoints to build customer profile and engage with the customer through one-on-one personalized communication and journeys.
- Build basic marketing communications to advanced customer journeys and campaigns while supporting different channels like email, SMS, mobile in-app/push notification, social media, and WhatsApp through API or flat file integration.
- It leverages journey builder to craft a unique customer experience at every step. Customers will go through different experiences based on their profiles and online interactions.
- The journey builder accepts data from multiple sources like landing pages, data extensions, Sales Cloud, and Service Cloud and extends it to other channels using custom activities.
- Einstein (AI) is integrated into journey builder to optimize customer communications and experience through content personalization, send-time optimization, controlled number of communications, and customer scoring.
- Journey builder seamlessly syncs data between Marketing Cloud Engagement and Sales/Service Cloud. We can add or update leads, contacts, accounts, and opportunities, assign campaign, create tasks, and raise cases based on customer interaction.

**88%** of customers say the experience a company provides is as important as its product or services.\*

*\*Source: Salesforce State of Connected Customer, 5<sup>th</sup> edition*



# Use cases: Marketing Cloud Engagement

The Marketing Cloud Engagement journey on the right shows the easy drag and different options to configure customer journeys with low/no-code.



**Cart abandonment or browse abandonment:**  
E-commerce sites can trigger the Marketing Cloud Engagement journeys to target customers based on cart abandonment or browse abandonment.



**Real-time communications on milestones:**  
Support commercial as well as transactional milestones (like purchase confirmations or shipping confirmations) through the buyer journey with real-time communications.



**Follow up based on feedback:**  
Offers support for carrying out surveys, capture the ratings of customers and alert the sales or service team to follow up with unhappy customers on an immediate basis.

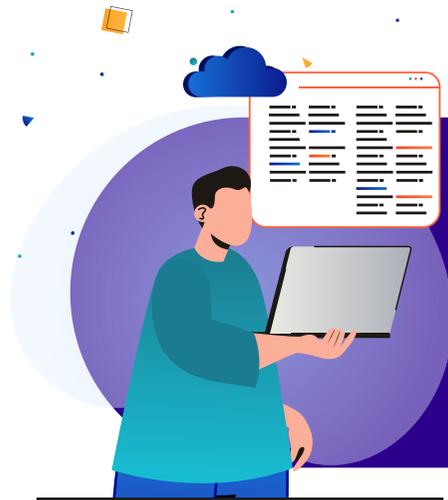


**Marketing Cloud Engagement with Sales/Services Cloud:**  
View the end-to-end customer funnel by utilizing marketing, sales, and service data. Customers can be targeted based on their current stage in the funnel or their interaction with marketing content.





# Marketing Cloud Customer Data Platform - an enterprise CDP from Salesforce



As privacy becomes a more significant concern for the consumers and we move toward a cookieless future, the way we capture and process the first-party data becomes more critical. Given the predicament, it is crucial to safely and effectively capture, process, and utilize customer data from multiple sources.

## Marketing Cloud Customer Data Platform (CDP) offers various capabilities to capture & process data effectively:

- It captures, unifies, segments, and activates all customer data. It connects and ingests data from all data sources to build a single customer profile.
- The unified profiles built using CDP help create rich audience segments using granular information and event-level data. The platform allows customer segmentation based on customer attributes, engagement, spending, and service records.
- It helps understand segment's reach across different channels before activating it on Marketing Cloud Engagement or other systems using real-time segmentation.
- It achieves personalization at scale using all data points available within CDP, from driving content optimization to delivering the next best action/offer and using AI for performance analytics.

**60%** of people ranked a single source of truth as their organization's most influential digital capability.\*

*\*Source: Salesforce The Future of Digital Customer Research, 2020*







# Marketing Cloud Personalization powered by Interaction Studio



At a time when the customer is exposed to various marketing campaigns across channels, marketers must personalize to stay relevant and stand out from the competition. However, offering real-time personalization is difficult as it involves combining data from multiple online and offline systems and delivering personalized content/offers to customers on the fly.

## Marketing Cloud Interaction Studio can drive real-time personalization:

- It observes and understands customer behavior to select the most suitable content/offer for a specific customer during a real-time engagement. Marketing Cloud Personalization enables integration with the website and app to customize content for each customer based on their behavior and earlier interactions.
- It uses behavioural (visitor interactions) affinity (how much a visitor interacts with an item compared to others in the same category) and other metrics to deliver the best experience and next best offer/action.
- It ingests and processes data in real-time for immediate activation across websites and apps for known and anonymous customers. Marketing Cloud Personalization can also be integrated with Marketing Cloud Engagement for open-time personalization in emails.

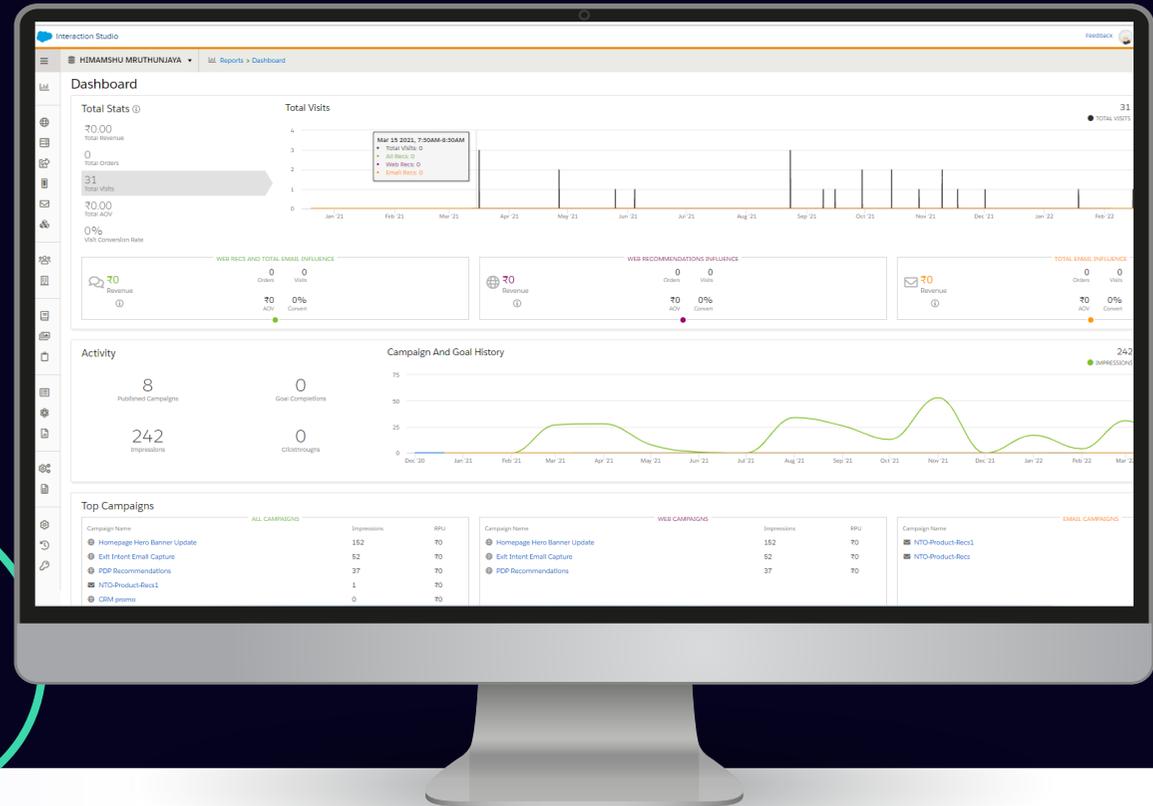
Personalization most often drives **10% to 15%** revenue lift.\*

*\*Source: Next in Personalization 2021 Report by McKinsey*



# Use cases: Marketing Cloud Personalization

Marketing Cloud Personalization dashboard gives us a high-level view of important metrics like total visits, total revenue, total orders, conversion rate, average order value, and campaign performance.



## Real-time Engagement:

Engage with customers in real-time across website and app by utilizing behavioural data, user attributes, affinities, and computed metrics (LTV, propensity, etc.). It serves personalized content and product recommendations dynamically across online and offline channels.



## Open-time email personalization:

Marketing Cloud Personalization uses machine learning to target and deliver personalized content and email recommendations. It helps convert static content to open-time personalized content.



## Exit Intent Email Capture/Bounce Prevention:

Gauge the customer's intent to close the browser and show a pop-up for email capture or an offer to prevent the customer from leaving the page.





## Marketing Cloud Advertising powered by Advertising Studio



Observing customer interactions on multiple channels provides insights that can help in audience activation on ad networks. However, marketers often face challenges in doing so and some important questions include: How can a non-interactive customer be targeted with ads? How to utilize customer data and create look-a-like models to target new customers and run acquisition ad programs?

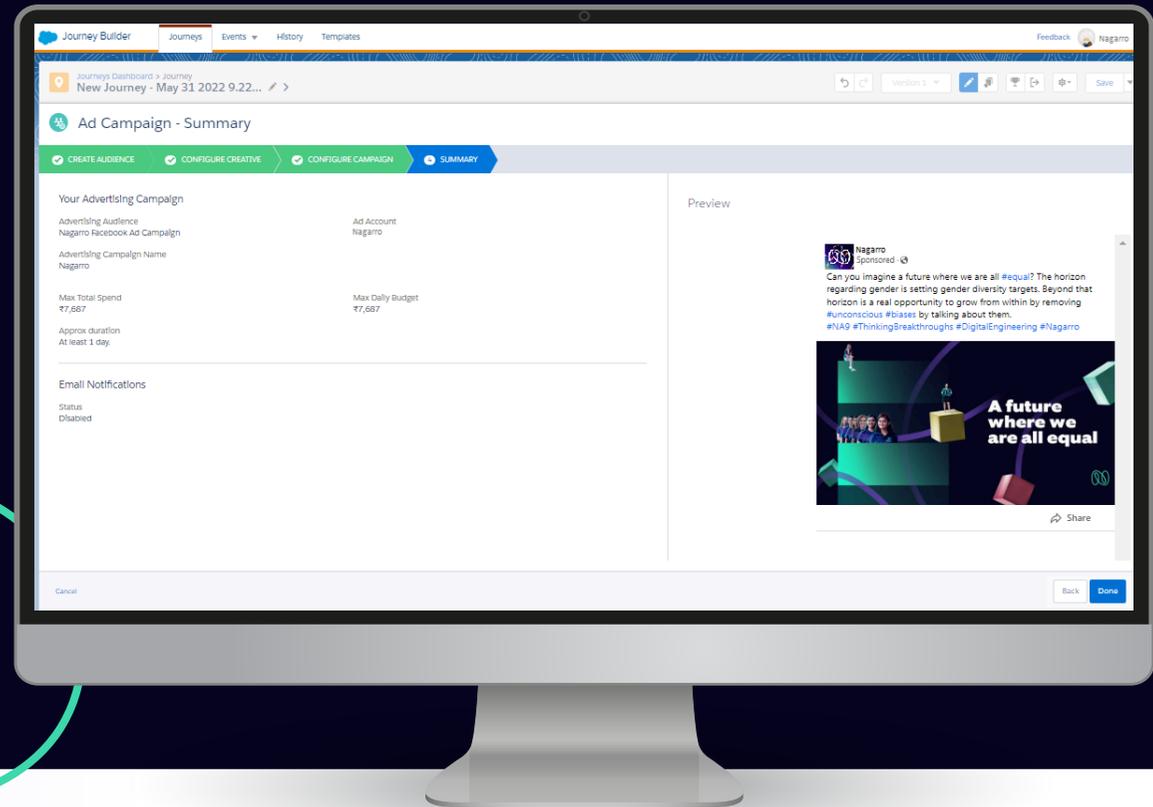
### Marketing Cloud Advertising Studio can help address these questions by:

- **Creating and activating audiences across different ad networks** like Facebook, Google, Instagram, LinkedIn, Twitter, and YouTube.
- **Bringing data from marketing, sales, and service together.** Uploading audience across ad networks and keeping them up to date.
- **Leveraging journey builder to create an audience and activate them on Facebook.** Designing creatives, defining the campaign budget and duration, and activating the ad. For example, utilizing the Facebook channel to engage with customers who don't respond to communications on other channels.



# Use cases: Marketing Cloud Advertising

Create a Facebook ad within the journey builder with few clicks. Define audience, content, total spending, daily budget, and duration.



## Optimize ad spending and suppress ads:

Optimize ad spending by identifying segments where customers have already made the purchase and ads aren't required, reducing ad spending.



## Re-engage inactive subscribers:

Create a list of customers who no longer interact with the brand on some channels and activate them across multiple ad networks to reconnect.



## Lookalike audience:

Gain new prospects that behave like high-value customers by using Facebook lookalike audiences and Google similar audiences.





## Marketing Cloud Intelligence powered by Datorama



Organizations carry out many marketing activities. It can be a simple email, real-time customer journey or an elaborate advertising campaign displayed on multiple channels. To achieve customer-centric marketing, organizations use multiple marketing platforms. Every platform comes with its own set of reporting capabilities, causing marketers to often miss out on a holistic view of performance.

### How can Marketing Cloud Intelligence help create a unified view of all marketing activities?

- **Actionable marketing intelligence through a deep dive into marketing insights.** Marketing Cloud Intelligence can be integrated with over 100 systems (not just marketing platforms but also databases, cloud storage platforms, and big data environments). It comes with in-built data modelling and AI machine learning that helps marketers build reports with ease.
- **Unified reporting and dashboards** built on unified data display KPIs, metrics, and classifications, providing key insight into what's working and what's not working across channels and campaigns.
- **SmartLens Apps in Marketing Cloud Intelligence** connects with Facebook ads, Google ads, Google Analytics, Google Campaign Manager, LinkedIn ads, Twitter ads, Bing ads, AppNexus, and Marketing Cloud Engagement to create dashboards on KPIs, trends, and analytics quickly and easily.

Only **20%** of marketers evaluate the performance of their cross-channel marketing in one centralized place.\*

*\*Source: Salesforce Marketing Intelligence Report, 3<sup>rd</sup> edition*



# Use cases: Marketing Cloud Intelligence



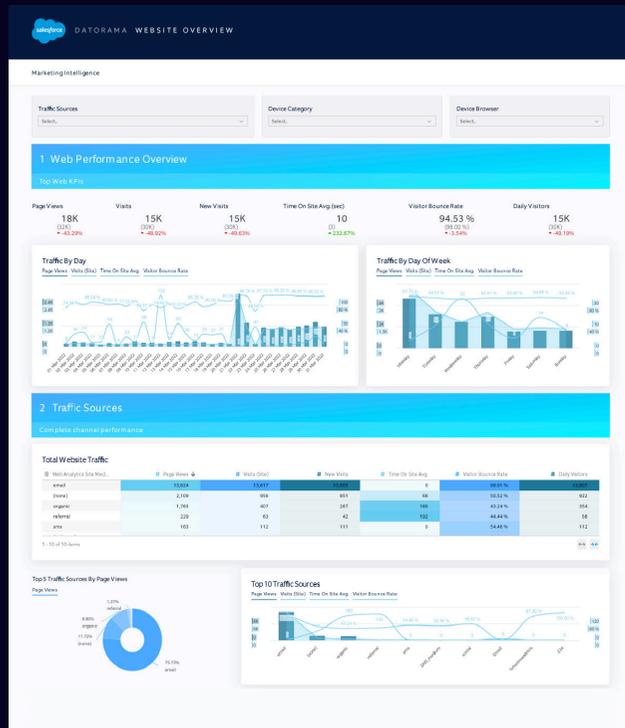
**Efficiency and ROI:**  
Reallocate spending based on analytics to increase efficiency. Insights and alerts help tweak campaigns and improve ROI.



**Cross-channel analytics:**  
Integrating different marketing systems provides cross-channel performance reporting.

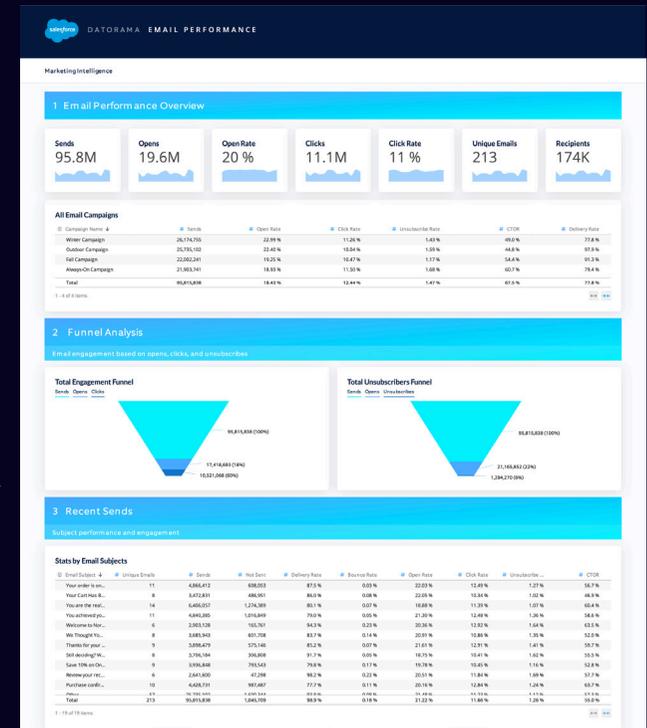


**Alignment and collaboration:**  
Unified reporting with aligned KPIs, metrics, goals, and taxonomy.



Website overview report provides KPIs like page views, visits, new visits, avg. time spent on site, bounce rate, and daily visitors. It also provides charts like traffic by data, top 5/10 traffic source, page views by device category, & browser breakdown.

Email analytics report shows journey details from Marketing Cloud Engagement. It provides visual charts & KPIs like delivery over time sends, delivery rate opens, click to open, unsubscribes, best and worst-performing emails.



# How to get started with Salesforce Marketing Cloud?

So far, we have talked about the different offerings from Salesforce Marketing Cloud – Marketing Cloud Engagement, Customer Data Platform, Interaction Studio, Advertising Studio, and Datorama. However, all organizations don't need to invest in all the tools at once. Before choosing tools and investing in them, it is important to identify marketing goals and business requirements. Marketers can then map those goals with the features and benefits offered by different tools and make their decisions.



## Let's walk through the process of selecting the right tool for your organization



If the main goal is communications across different channels like email, SMS, mobile push/in-app, WhatsApp, and social Media, then we would suggest starting with Marketing Cloud Engagement.



If you have multiple disparate systems and are struggling to create a unified customer view, then Marketing Cloud Customer Data Platform can solve the problem.



If the main concern is real-time personalization and targeting on the website and app, then Marketing Cloud Personalization (Interaction Studio) is the best-suited solution.



If you want to run targeted ad campaigns based on existing customers, then Marketing Cloud Advertising can activate the audience on ad networks.



If you are running campaigns and marketing activities across multiple tools and platforms and struggling to get a complete view of marketing performance, then Marketing Cloud Intelligence (Datorama) will help you visualize spending & performance.

Every tool helps us solve a specific challenge and identifying the challenges faced by the organization helps us choose the right tools. And if you are just beginning your Salesforce Marketing Cloud journey, we suggest you start small, test, learn, improve, & then expand.



# How Nagarro can help?

Our association with Salesforce started back in 2012. In the past decade, Nagarro's Salesforce practice has grown 40% year on year to become one of the best service providers in the Salesforce ecosystem. Driven by a team of 500+ consultants with 1200+ Salesforce certifications, we have successfully delivered 200+ projects for 80+ clients during this period.

We don't see ourselves as just an IT company that sets up your Marketing Cloud or other salesforce projects, but we see ourselves as strategic consultants, going beyond just setting up the marketing tools. We partner with you in building your marketing strategy and goals after evaluating how best we can help you achieve them. From analyzing your current marketing activities to designing and developing step-by-step processes and timelines, we will be there to help you build a smooth and omnichannel customer experience.

**Together, let us build marketing campaigns that your customers would remember and rejoice!**



## Author



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[\*\*in\*\* Connect](#)

Himamshu is a marketing strategy consultant and highly distinguished IT professional, with over 13 years of experience in working on marketing tools such as Salesforce Marketing Cloud, Adobe Campaign Classic, Adobe Campaign Standard, Adobe Marketo and Silverpop. He comes with extensive business knowledge and proficiency in strategy formulation, requirement gathering, project planning, stakeholder management, and solution implementation using agile methodology.

