D+A
Desouza and Associates Inc.

Health Care Insurance Provider provides personalized email marketing with a custom preference center

Company Category: Enterprise (> USD $100 Billion)
Application Involved: Salesforce Marketing Cloud

The Customer

As one of the largest health-care providers in the US, our customer operates under 6 Brands and has more than 30 million records in their Marketing Cloud instance.

Key Challenge:

The customer was receiving sign-ups from their proprietary customer portal through employee benefit programs. This data was being manually imported into Salesforce Marketing Cloud.
However:

1. The profile center had been built partially in Salesforce Marketing Cloud and partially in an external .net platform that was no longer accessible. The implication was that it could not be updated to keep pace with updated requirements.
2. The legacy Profile center did not match up to the subscription lists and data extensions used by the marketing team.
3. Not all lists/data extensions were available to all brands and segmentation was a critical pain point.
4. As the data was manually imported, there were issues with
    a. The email status of records – Unsubscribed contacts were overwritten and opted back in without their consent
    b. Profile attributes that did not exist or did not match the attributes in Salesforce Marketing Cloud.
    c. The Data Operations center was spending a lot of time in scrubbing and setting up the data for importing into the marketing cloud all subscribers' database.
5. The marketing team were not able to pull reports or accurately filter the data by brand or by subscription to send out even the most generic "Health and Well-being" newsletter resulting in depressed outreach efforts.

Solution

D+A proposed a solution that would set-up all of the components of the preference center within Salesforce Marketing Cloud in order to allow for it to be updated to keep pace with the company marketing team's email marketing requirements.

We provided end-to-end strategy, subject matter expertise and implementation services that included
1. User Experience and Design
2. Solution Architecture
3. AMPscript Coding
4. Automated Integration and Import of Data using the API
5. Set up Microsites and Landing Pages
6. Set up Dynamic Content
7. Used Smart Capture Forms
8. Create Triggered Email Confirmation
9. Created Coding for Error Pages
10. Used custom coding to handle security/privacy requirements
11. Training a documentation

Results

The company now has a fully scalable Preference Center built entirely inside Salesforce Marketing Cloud and fully integrated with their customer portal. They are now able to create filtered data extensions and lists by brand and are able to market to a larger and more current database of end-users.