

Marketing Cloud Use Cases



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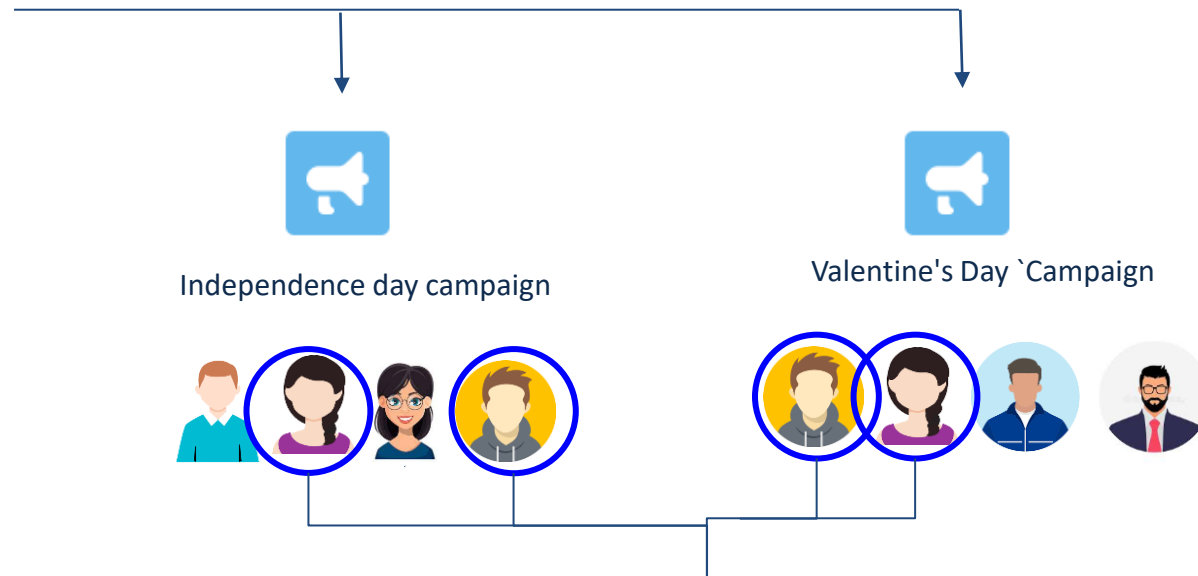
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Different channels reaching single prospect - Key Challenge

Addition of prospects to duplicate campaigns. This leads to calling the same prospect multiple times due to lack of unified view



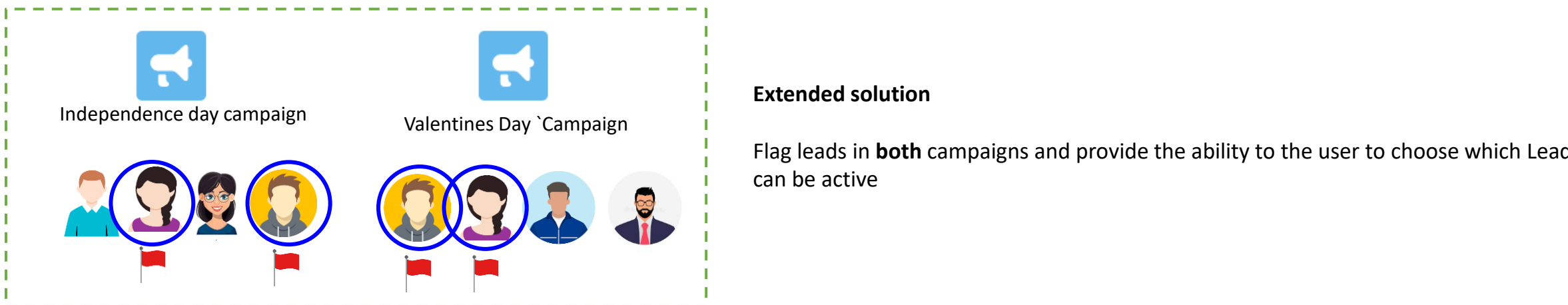
Parent Campaign



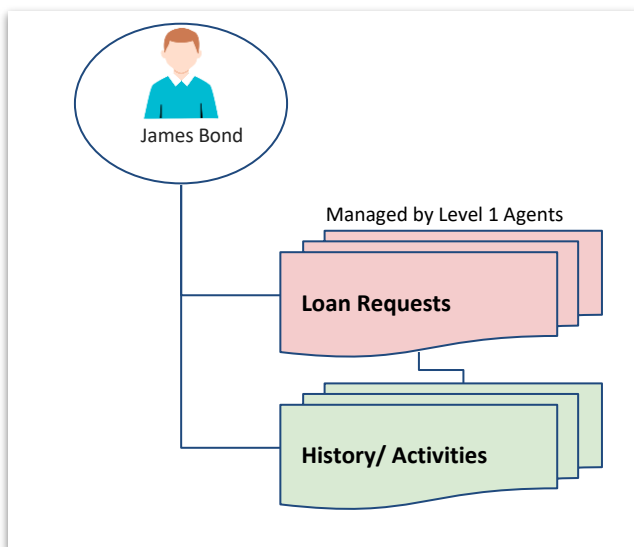
These customers are active campaign members in both campaigns, it's important to validate if the Lead is eligible for both offers provided the campaigns.

Different channels reaching single prospect - Transformation

This can be addressed by introducing deduplication at Lead level so that the same lead is not assigned to multiple campaigns

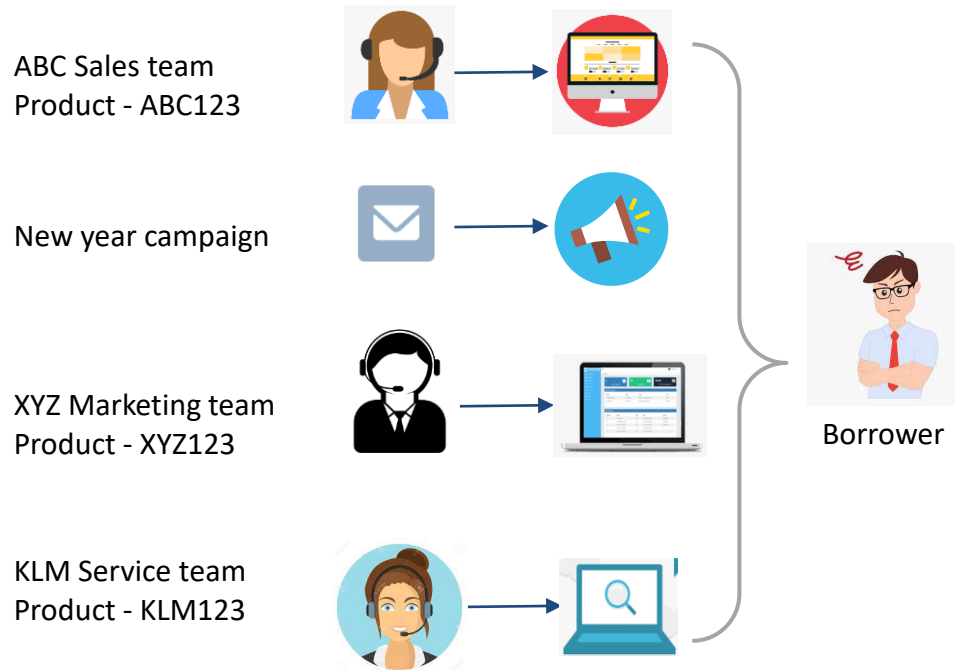


How will the solution benefit ?



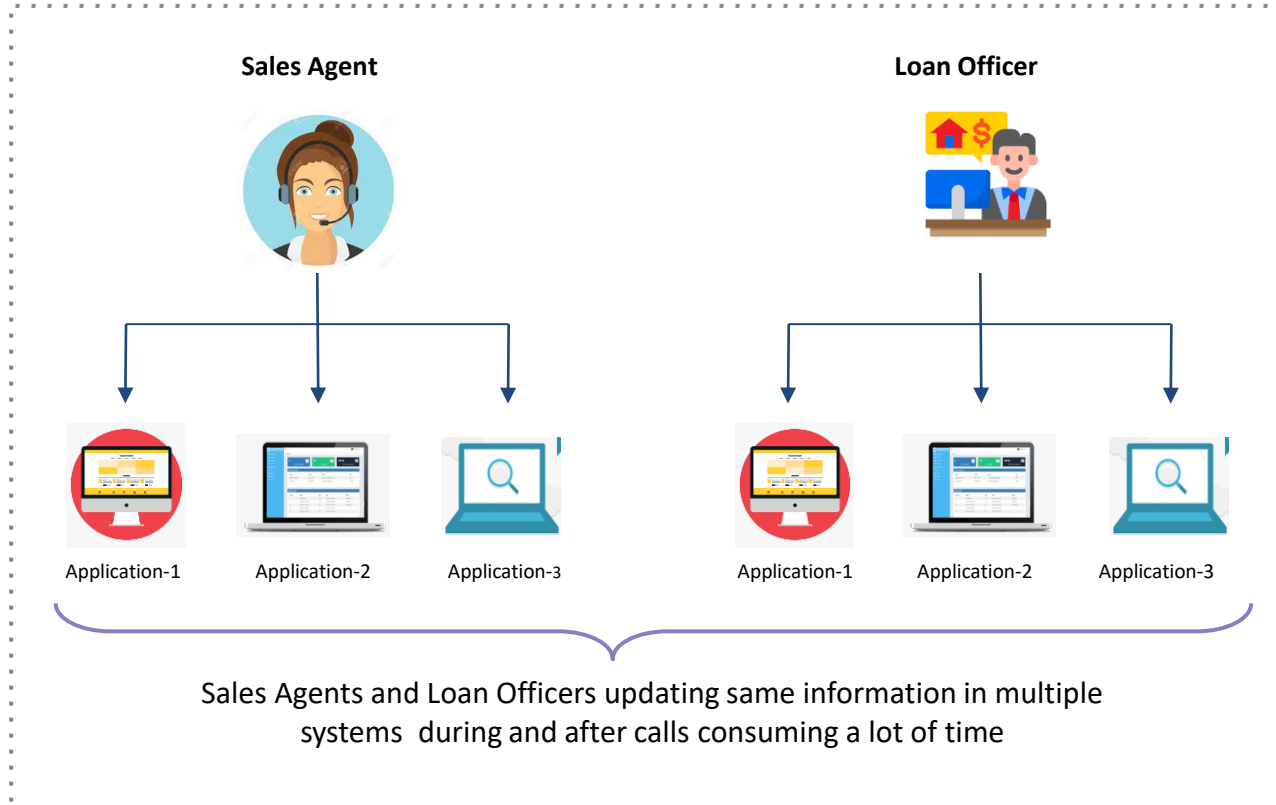
- Deduplication logic provides ability to turn on and off the dedup mode.
- Data exchange can happen with multiple systems while looking for duplicates without any data loss.
- The deduplication model provides the ability to detect duplicates right at the moment of manual data entry which in turn prevents the record from further being created.
- Deduplication compares specific fields by customizing the Match criteria's and survival rule gives it the flexibility to adapt to different types of data.
- It makes sure that no two different users are working or processing the duplicates of the original data, and prevents wasted effort.
- Target customers very effectively with the perfect data.

Disjointed Marketing Outreach - Key Challenge



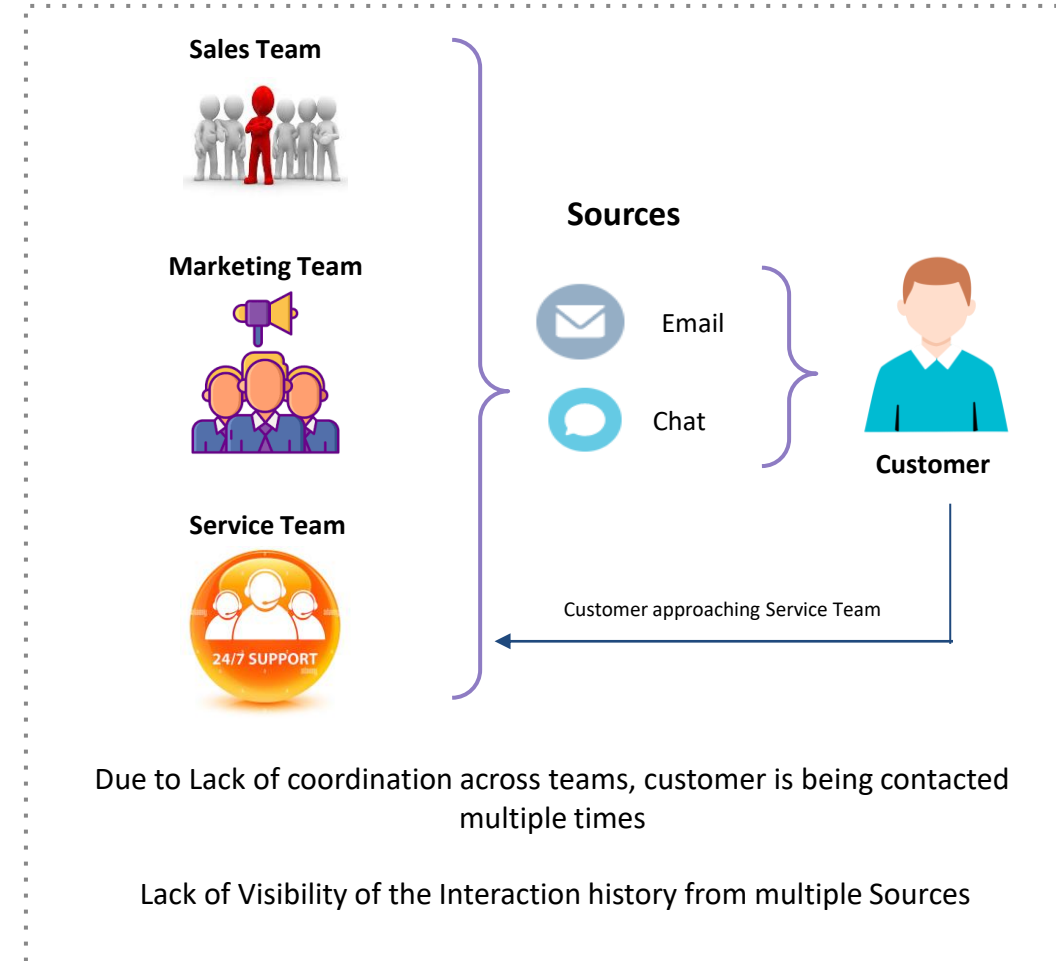
- The biggest challenge is lack of a unified Prospect view which leads to disjoint marketing effort especially across channels.
- Lack of data visibility between teams resulting in a single prospect receiving calls from multiple teams/processes
- Loan officers swivel chairing and ending up updating the final disposition in multiple applications which consumes lot of LO's productive time
- No integration between applications leading to borrower receiving multiple calls which ends up in less CSAT scores
- Sales/Service/Marketing team capturing the entire transaction/interaction History within multiple sources and saving it in multiple applications.
- During the interaction process it contains multiple interactions with multiple sources, which creates confusion and takes a lot of time for the agent to communicate.

Disjointed Marketing Outreach and Swivel chairing - Transformation

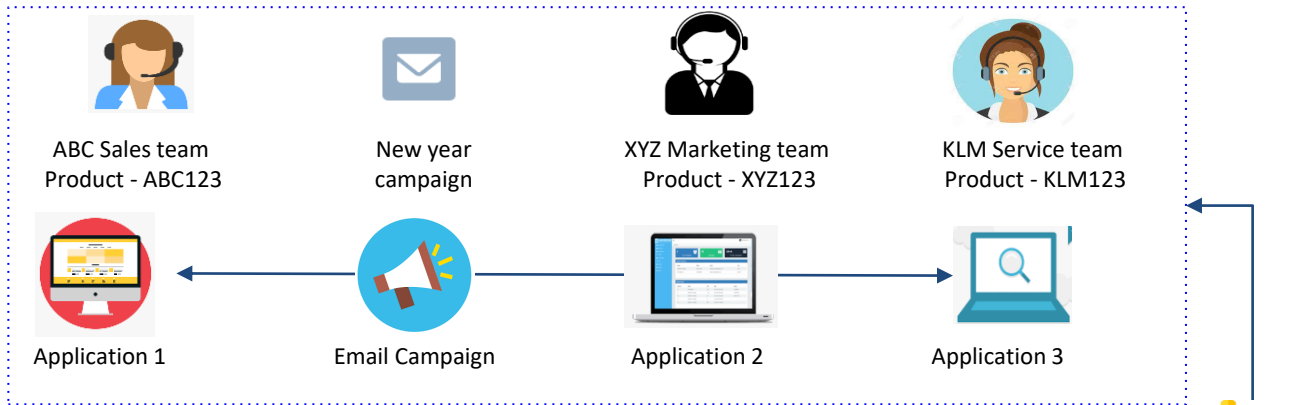


Open questions:

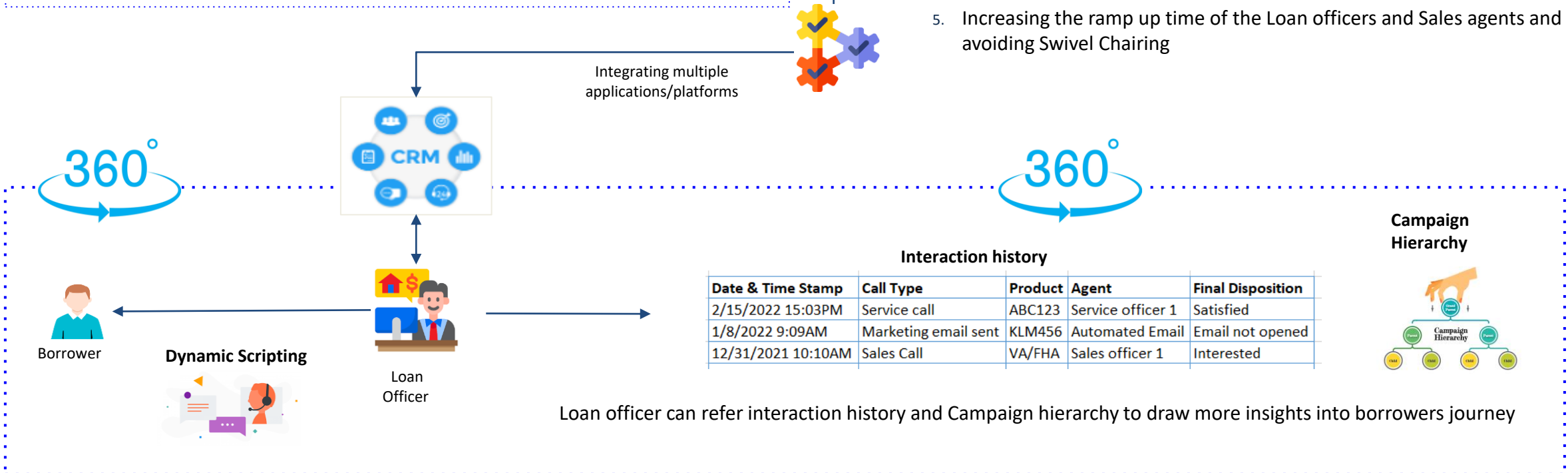
1. Marketing team is unaware of the customer being contacted or if there is any open service request, instead of resolving customer query marketing team is counter offering the new product which can make the customer disappointed.



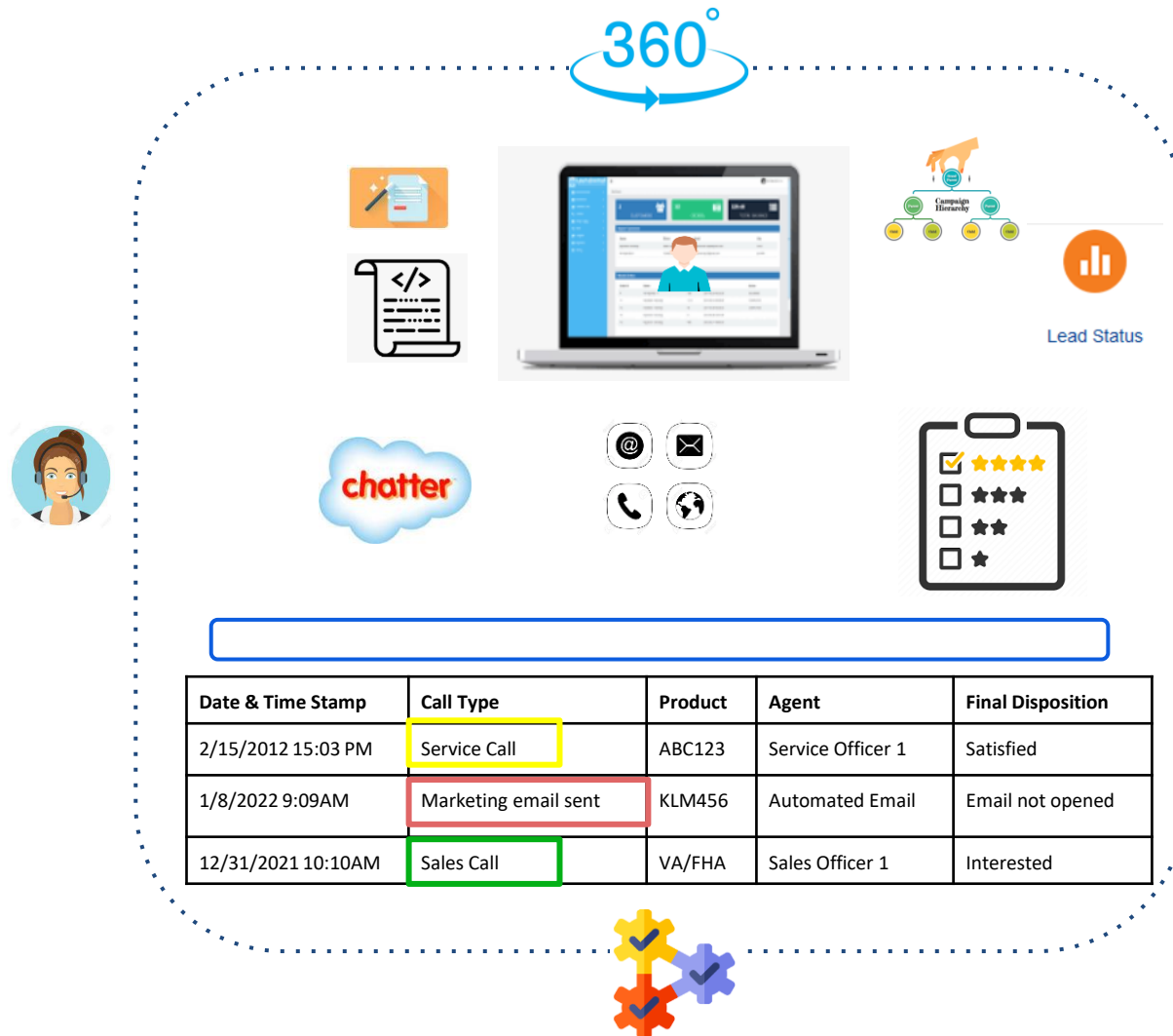
Disjointed Marketing Outreach and Swivel chairing - Transformation



1. When all teams are on a single CRM solution, they have a better understanding of information being provided to Borrower.
2. Loan officers can achieve greater turnaround time on each call/interaction
3. Since all applications are integrated, Loan officer can select final disposition in Salesforce which can be further integrated with other connected systems
4. This standardization helps achieving greater customer satisfaction index and customer success
5. Increasing the ramp up time of the Loan officers and Sales agents and avoiding Swivel Chairing




Disjointed Market Outreach → How will the solution benefit?



- The unified Customer 360 view helps agent work productively as the entire Borrower information is at a single place.
- Dynamic scripting tools help maintain the same flow of conversation through different calls & interactions allowing to maintain brand image and increase the ability to sell more and effectively.
- When Sales, Marketing and Service teams are integrated and all the call interactions are captured through integration, Loan officer have a better view of consolidated from Interaction History.
- This solution increases ramp up time of the Loan officers and Sales agents, avoiding Swivel Chairing.
- Insights into customer interests can be made more effective by offering relevant products.
- Capturing the entire transaction/interaction history enables anyone on the Sales team to understand/serve the customer with minimal context from the customer itself.

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Thank you

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