



CONFIGURATIONS THAT DRIVE
VALUE FROM SALESFORCE

EMAIL MARKETING STRATEGIES

EMAIL STRATEGIES

Enables businesses to create personalized and targeted email campaigns. Users can easily create and send emails, as well as track campaign success.

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USE SALESFORCE EMAIL TEMPLATES TO CREATE CUSTOM EMAIL DESIGNS THAT REFLECT YOUR BRAND AND MESSAGING

A real-world example of using Salesforce Email Templates would be for a business that sends out regular email communications to customers, such as newsletters or promotional offers. By using custom email templates, the business can ensure that their branding and messaging is consistent across all email communications.



Benefits of using Salesforce Email Templates include:

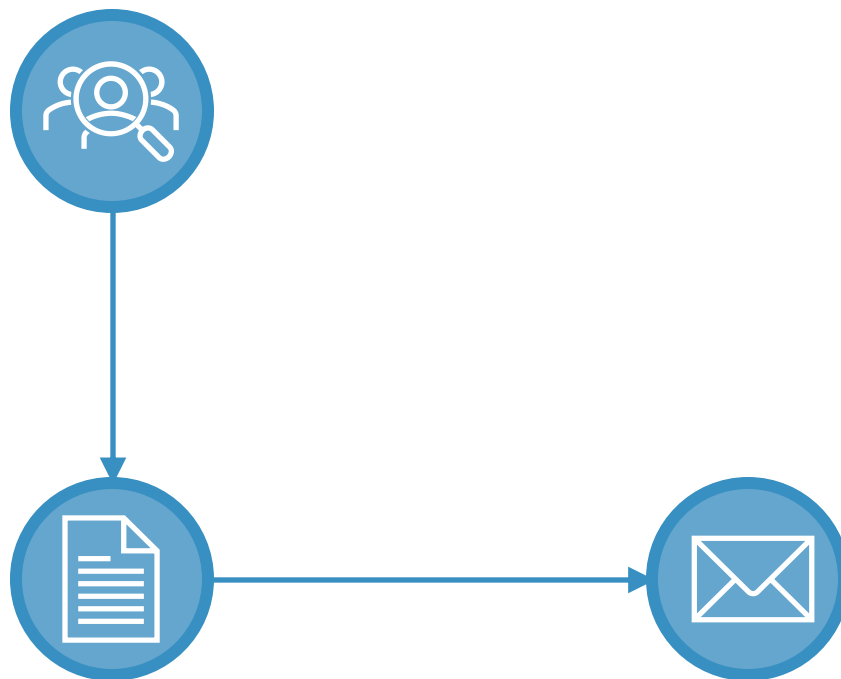
- **Consistency:** By using consistent email templates, the business can reinforce their brand and messaging in all email communications, which helps to build brand awareness and recognition.
- **Time-saving:** Creating a custom email template once can save time and effort in the long run, as the template can be reused multiple times for future email communications. This can be particularly helpful for businesses that send out regular newsletters or promotional offers.
- **Professionalism:** Custom email templates can make the business's email communications look more professional and polished, which can help to build trust and credibility with customers.
- **Personalization:** Salesforce Email Templates can also be customized to include personalized content or dynamic fields, which can help to increase engagement and response rates from customers.

Overall, using Salesforce Email Templates can help businesses to create professional and consistent email communications, while also saving time and improving engagement with customers.

PERSONALIZE YOUR EMAILS WITH MERGE FIELDS THAT PULL DATA FROM YOUR SALESFORCE RECORDS

Using merge fields in emails sent from Salesforce allows for personalized and targeted communication with customers or prospects. For example, if a sales representative is following up with a potential customer who has expressed interest in a specific product or service, they can use merge fields to include the customer's name and specific details about the product or service they are interested in.

This level of personalization can help increase engagement and build stronger relationships with customers. Additionally, using merge fields can save time by automatically pulling relevant information from Salesforce records rather than manually entering it into each email.



USE SALESFORCE CAMPAIGNS TO TRACK THE SUCCESS OF YOUR EMAIL MARKETING EFFORTS

Salesforce Campaigns can be used to track the success of email marketing efforts by creating a campaign for each email marketing campaign and associating the relevant leads or contacts with the campaign. This allows businesses to track the effectiveness of each email marketing campaign in terms of open rates, click-through rates, and conversion rates.



For example, let's say a business runs an email marketing campaign to promote a new product launch. The business can create a campaign in Salesforce for this product launch and associate all the leads or contacts that received the email with this campaign. As the campaign progresses, the business can track the number of opens, clicks, and conversions for each email and use this data to refine future email marketing campaigns.

The benefits of using Salesforce Campaigns to track email marketing efforts are numerous. By tracking the success of each email campaign, businesses can:

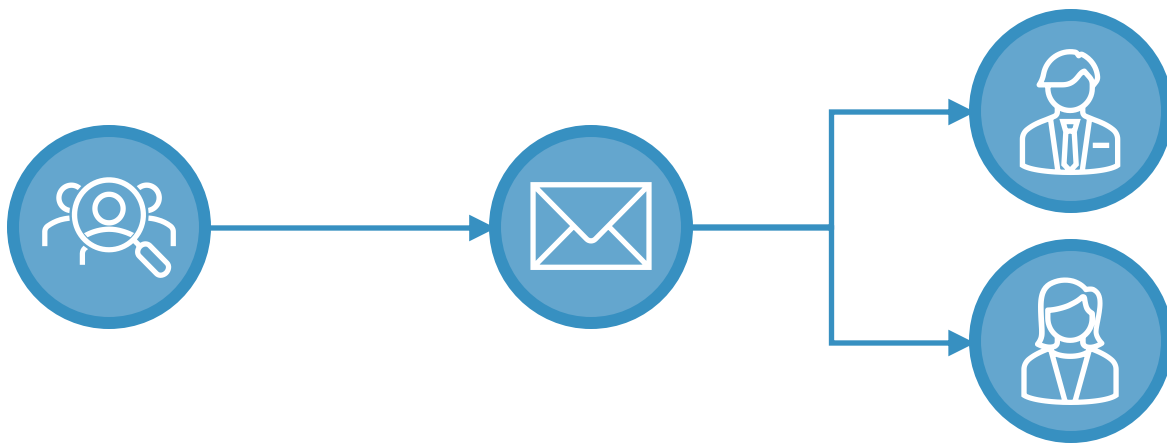
- **Measure the ROI of their email marketing efforts:** By tracking the conversion rates of each email campaign, businesses can determine how much revenue each campaign generates and calculate the ROI of their email marketing efforts.
- **Identify the most effective email campaigns:** By tracking open rates, click-through rates, and conversion rates, businesses can identify which email campaigns are most effective and use this data to refine future campaigns.
- **Improve segmentation and targeting:** By tracking which leads or contacts respond best to each email campaign, businesses can refine their segmentation and targeting strategies to better reach their desired audience.
- **Optimize email content:** By analyzing the data from each email campaign, businesses can determine which types of content and messaging are most effective and use this data to optimize future email content.

Overall, using Salesforce Campaigns to track email marketing efforts can help businesses improve the effectiveness of their email campaigns, increase ROI, and drive revenue growth.

USE SALESFORCE EINSTEIN AI TO SEGMENT YOUR EMAIL LISTS AND TARGET SPECIFIC GROUPS OF CUSTOMERS

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Salesforce Einstein AI can be used to segment email lists and target specific groups of customers based on behavior, interests, and preferences. For example, it can analyze past purchase behavior, browsing history, and demographic data to identify patterns and segment customers into groups. Let's say a retail business wants to promote a new line of clothing to its customers. The business can use Salesforce Einstein AI to segment its email list into different groups based on past purchase behavior, such as customers who have previously purchased similar items or customers who have shown an interest in the brand. By analyzing the data from past purchases, Einstein AI can also identify trends and preferences among customers, such as color or style preferences.



Once the email list is segmented, the business can use targeted email marketing campaigns to promote the new line of clothing to each group. For example, customers who have shown a preference for a specific color can receive emails featuring items in that color, while customers who have previously purchased a certain type of clothing can receive emails with similar items. The benefits of using Salesforce Einstein AI to target specific groups of customers are numerous:

- **Improved personalization:** By targeting specific groups with personalized content and offers, businesses can increase engagement and build stronger relationships with customers.
- **Increased ROI:** By targeting the right customers with the right message, businesses can increase the ROI of their email marketing campaigns.
- **Higher conversion rates:** By targeting customers based on their behavior and preferences, businesses can increase the likelihood of conversion and drive sales growth.
- **Time and cost savings:** By automating the segmentation and targeting process, businesses can save time and reduce costs associated with manual segmentation and targeting.

Overall, using Salesforce Einstein AI can help businesses improve the effectiveness of their email marketing campaigns, increase ROI, and drive revenue growth.

USE SALESFORCE JOURNEY BUILDER TO CREATE PERSONALIZED CUSTOMER JOURNEYS THAT INCLUDE EMAIL MARKETING CAMPAIGNS

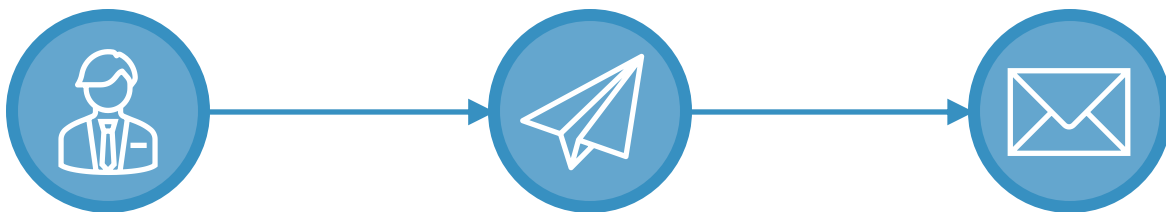
Salesforce Journey Builder can be used to create personalized customer journeys that include email marketing campaigns. Journey Builder allows businesses to map out the customer journey, from initial awareness to conversion and retention, and automate personalized interactions with customers at every stage of the journey.

Let's say a business wants to promote a new service to its customers. The business can create a journey in Salesforce Journey Builder that maps out the customer journey from awareness to conversion. The journey can include personalized interactions with customers, such as welcome emails, educational content, and targeted offers.

As customers interact with the journey, their behavior and preferences are tracked in Salesforce. Based on this data, the business can use Journey Builder to automate personalized email marketing campaigns that are tailored to each customer's interests and needs.

The benefits of using Salesforce Journey Builder to create personalized customer journeys that include email marketing campaigns are numerous:

- **Improved customer experience:** By providing personalized interactions at every stage of the customer journey, businesses can improve the overall customer experience and build stronger relationships with their customers.
- **Increased engagement:** By delivering targeted and relevant content to customers, businesses can increase engagement and drive higher open and click-through rates for their email marketing campaigns.
- **Higher conversion rates:** By delivering personalized offers and promotions to customers, businesses can increase the likelihood of conversion and drive sales growth.
- **Time savings:** By automating the customer journey and email campaigns, businesses can save time and reduce costs associated with manual interactions and campaigns.



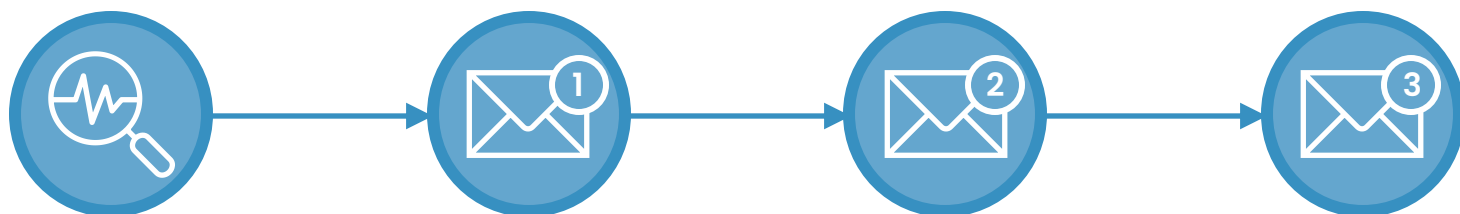
Overall, using Salesforce Journey Builder can help businesses improve the effectiveness of their marketing efforts, increase customer engagement and loyalty, and drive revenue growth.

USE SALESFORCE PARDOT TO CREATE AND MANAGE COMPLEX EMAIL MARKETING CAMPAIGNS

Salesforce Pardot can be used to create and manage complex email marketing campaigns that are tailored to the needs and preferences of each customer. Pardot offers a variety of tools and features that enable businesses to create targeted email campaigns, track customer behavior and engagement, and optimize their campaigns for maximum ROI.

Let's say a business wants to launch a new product and promote it to its customers. The business can use Pardot to create a series of targeted email campaigns that are tailored to the needs and preferences of each customer. For example, the first email in the campaign might be an announcement email that introduces the new product and highlights its features and benefits. The second email might be a follow-up email that provides additional information about the product and encourages customers to take action, such as visiting the website or making a purchase.

Pardot also allows businesses to track customer behavior and engagement, such as email opens, clicks, and conversions. Based on this data, businesses can optimize their email campaigns for maximum ROI by testing different subject lines, calls-to-action, and content.



The benefits of using Salesforce Pardot for complex email marketing campaigns are numerous:

- **Improved targeting:** By creating targeted email campaigns that are tailored to the needs and preferences of each customer, businesses can increase the effectiveness of their campaigns and drive higher engagement and conversion rates.
- **Better insights:** By tracking customer behavior and engagement, businesses can gain valuable insights into customer preferences and behaviors, which can be used to inform future marketing campaigns and product development efforts.
- **Increased ROI:** By optimizing email campaigns for maximum ROI, businesses can increase revenue and profitability while reducing costs associated with ineffective campaigns.
- **Time savings:** By automating the email marketing process, businesses can save time and resources that can be used for other strategic initiatives.

Overall, using Salesforce Pardot can help businesses improve the effectiveness of their marketing efforts, increase customer engagement and loyalty, and drive revenue growth.

USE SALESFORCE INBOX TO TRACK EMAIL ENGAGEMENT AND FOLLOW UP WITH CUSTOMERS

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Salesforce Inbox can be used to track email engagement and follow up with customers. Inbox is an email client that integrates with Salesforce, enabling businesses to track and manage email interactions with customers, and automate follow-up tasks.

Let's say a sales representative is responsible for following up with leads and prospects via email. The sales representative can use Inbox to track and manage all of their email interactions with leads and prospects, including email opens, clicks, and replies.

Based on this data, the sales representative can prioritize follow-up tasks and schedule automated reminders for future follow-up. For example, if a lead has not responded to an email after a certain time, the sales representative can receive an automated reminder to follow up with the lead.



The benefits of using Salesforce Inbox are numerous:

- **Improved productivity:** By centralizing email interactions and automating follow-up tasks, sales representatives can save time and increase productivity.
- **Better insights:** By tracking email engagement, businesses can gain valuable insights into customer preferences and behaviors, which can be used to inform future marketing and sales efforts.
- **Increased efficiency:** By automating follow-up tasks, businesses can ensure that leads and prospects are being contacted in a timely and consistent manner, which can increase the likelihood of conversion and drive sales growth.
- **Enhanced collaboration:** By integrating with Salesforce, Inbox enables sales representatives to collaborate with other team members, such as marketing and customer service, to provide a seamless customer experience.

Overall, using Salesforce Inbox to track email engagement and follow up with customers can help businesses improve their sales productivity, increase customer engagement and loyalty, and drive revenue growth.

USE SALESFORCE SALES CLOUD TO INTEGRATE YOUR EMAIL MARKETING EFFORTS WITH YOUR SALES TEAM'S ACTIVITIES

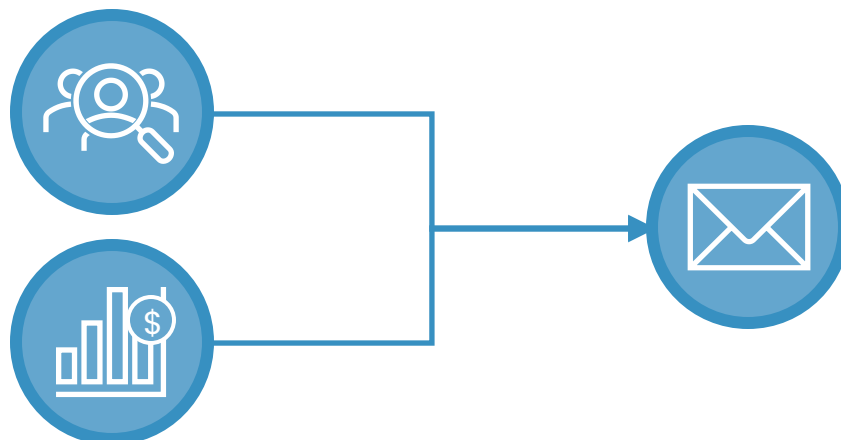
Salesforce Sales Cloud can be used to integrate email marketing efforts with sales team activities, creating a seamless customer experience. This integration enables businesses to streamline the sales process, increase efficiency, and improve customer engagement and satisfaction.

Let's say a business has a database of leads it wants to target with email marketing campaigns. Sales Cloud can be used to store and manage this database and integrate it with the business's email marketing platform. The sales team can see which leads and prospects are engaging with the emails, which enables them to prioritize follow-up tasks and focus efforts on leads that are showing the most interest in the business's products or services.

Additionally, Sales Cloud can be used to track the status of each lead throughout the sales process, from initial contact to final sale. This enables the sales team to provide a personalized and seamless experience for each customer, increasing customer satisfaction and loyalty. The benefits are:

- **Increased efficiency:** By integrating email marketing efforts with sales team activities, businesses can streamline the sales process and reduce the amount of time and resources required to convert leads and prospects into customers.
- **Improved collaboration:** By providing a single platform for sales and marketing teams to work together, it promotes collaboration and improves communication between teams.
- **Better insights:** By tracking email engagement and sales activities in a single platform, Sales Cloud provides businesses with valuable insights into customer behaviors and preferences, which can be used to inform future marketing and sales efforts.
- **Increased revenue:** By improving the efficiency and effectiveness of the sales process, businesses can increase revenue and profitability.

Overall, Salesforce Sales Cloud can help businesses improve sales productivity, increase customer engagement and loyalty, and drive revenue growth.



USE SALESFORCE MOBILE APP TO CREATE AND SEND EMAILS ON-THE-GO

Salesforce Mobile App can be used to create and send emails on-the-go, enabling sales representatives and other team members to stay productive and responsive, no matter where they are. This feature provides businesses with several benefits, including increased productivity, improved customer engagement, and greater flexibility.



Let's say a sales representative is traveling to a client meeting and realizes that they need to follow up with a prospect. Using Salesforce Mobile App, the sales representative can quickly create and send an email to the prospect from their mobile device.

This enables the sales representative to stay productive and responsive, even while on the go, and ensures that the prospect receives a timely and personalized follow-up.

The benefits of using Salesforce Mobile App to create and send emails on-the-go are numerous:

- **Increased productivity:** By enabling team members to create and send emails from their mobile devices, Salesforce Mobile App can help businesses stay productive, even when team members are out of the office.
- **Improved customer engagement:** By providing a timely and personalized response to customer inquiries and follow-ups, businesses can improve customer engagement and satisfaction.
- **Greater flexibility:** By allowing team members to work from anywhere, Salesforce Mobile App provides businesses with greater flexibility and agility, enabling them to respond quickly to changing customer needs and market conditions.
- **Enhanced collaboration:** By enabling team members to access customer data and collaborate with colleagues on-the-go, Salesforce Mobile App promotes collaboration and teamwork, improving overall productivity and efficiency.

Overall, using Salesforce Mobile App to create and send emails on-the-go can help businesses stay productive, responsive, and engaged with customers, driving revenue growth and improving overall business performance.

USE SALESFORCE ENGAGE TO AUTOMATE AND PERSONALIZE EMAIL COMMUNICATION WITH PROSPECTS

Salesforce Engage is a marketing automation tool that enables businesses to automate and personalize email communication with prospects. By leveraging advanced analytics and data-driven insights, Salesforce Engage enables businesses to engage prospects with relevant and timely content, increasing the likelihood of conversion and improving overall customer satisfaction.

Let's say a business wants to target a specific group of prospects with a personalized email campaign. Using Salesforce Engage, the business can segment the target audience based on factors such as industry, company size, or job title. They can then create a series of personalized emails that speak to the specific needs and pain points of each segment. These emails can be automated and scheduled based on the prospect's behavior and engagement with previous emails.



Using Salesforce Engage, businesses can also track and analyze engagement and conversion rates of each campaign, enabling them to refine and optimize their approach over time. The benefits are:

- **Improved engagement:** By delivering relevant and personalized content to prospects, businesses can increase engagement and response rates, leading to higher conversion rates.
- **Increased efficiency:** By automating email campaigns, businesses can improve efficiency and reduce the amount of time and resources required to convert prospects into customers.
- **Better insights:** By tracking engagement and conversion rates, businesses can gain valuable insights into the behavior and preferences of their target audience, enabling them to refine and optimize their approach over time.
- **Improved ROI:** By improving engagement and conversion rates, businesses can increase their return on investment and drive revenue growth.

Overall, Salesforce Engage can help businesses improve engagement, efficiency, and ROI, driving growth and improving overall business performance.

QUESTIONS?

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