

MARKETING CLOUD CASE STUDY

Kickstarting Customer Experience Transformation for United Site Services



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The Situation

United Site Services (USS)—the market leader in portable toilet and temporary fence rental services—recently sought to optimize the company’s lead nurturing and quote-to-order processes through delivery of more personalized and relevant messaging and content. USS brought in Bold Orange to plan and operationalize the implementation of Salesforce Marketing Cloud over a four-month period, knowing our team would be able to deliver on immediate needs as well as the longer-term vision for true customer experience transformation.

Our Approach

Beyond the technical stand-up of Marketing Cloud and its integration with Sales Cloud, our team focused on creating email templates and other custom components, IP warming, and—most critically—journey mapping. BOCO’s customer experience strategists worked with key USS business stakeholders over several weeks to ideate and document new flows that could be set up as business rules within Marketing Cloud’s journey management function. The discussions captured existing communications workflows—but also provided stimulus for the creation of more sophisticated and personalized touchpoints to nurture relationships and improve close rates.

The Impact

BOCO’s business value-oriented approach to the Marketing Cloud implementation helped to significantly accelerate USS’s customer strategy planning and operationalization timeline. And the detailed experience flows built with the business teams identified specific areas of content, creative development, and process evolution to be prioritized in future work streams. In short, the engagement successfully kickstarted USS’s major push to enhance the experience it provides to customers and prospects throughout the relationship lifecycle.

Solution Overview

- Technical stand-up of the Salesforce Marketing Cloud platform
- Development of SFMC email templates, custom components and asset library
- IP warming strategy, delivery and monitoring
- Sales & Marketing Journey mapping and development
- Migration from Pardot and integration to Sales Cloud using MC Connect



“It was a real joy to see how the business team bought into the value of the journey mapping process as a means—not only to build requirements for the Marketing Cloud journeys—but also to structure their thinking around the evolution of their customer experience strategy.”

James Vila

BOCO Client Strategy Team