

Optimizing Customer Journeys Using Salesforce Marketing Cloud for A UK-Based Pension Advisory Firm



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Overview

Explore how a UK-based financial firm set out to elevate its lead engagement strategy by partnering with Synexc to optimize Salesforce Marketing Cloud.

Why This Matters for Other Businesses

When advising on pensions and lifetime investments, client engagement must be proactive, personal, and precisely timed. A disjointed communication strategy can lead to disengaged leads and lost opportunities.

How Synexc Helped

Synexc helped the client map and implement a Salesforce-powered journey using Marketing Cloud and CRM data to drive automation, personalization, and performance tracking

Key Improvements



About the Client

With over half a billion pounds in assets under management, our client is **a UK-based pension advisory firm** providing expert guidance across a wide range of retirement-related financial issues. The firm aims to deliver personalized, timely, and trustworthy advisory experiences for every client.

Challenges Faced by the Client

Challenge 1

Lack of a Structured Customer Journey

Despite having SFMC, the client lacked a cohesive journey framework to guide leads through the funnel, which led to disconnected experiences and engagement drop-offs.

Challenge 2

Manual and Inconsistent Follow-ups

Reliance on manual processes for outreach led to inconsistent messaging and delayed responses in a high-trust, timing-sensitive industry.

Challenge 3

Limited Personalization at Scale

Without an integrated system pulling behavioral and preference data, communications were largely generic, causing low engagement and reduced conversions.



Challenge 4

No Automation or Trigger Based Engagement

Absence of any automated enrollment rules or trigger points based on lead behavior or CRM changes created friction in the customer experience and left high-intent leads.

Challenge 5

Inadequate Visibility into Journey Performance

Without an integrated system pulling behavioral and preference data, communications were largely generic, causing low engagement and reduced conversions.



Solutions Offered

We partnered with the client to build a fully automated, data-driven customer journey using Salesforce CRM and Marketing Cloud.



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Defining and Mapping Customer Journey Mapping Using Journey Builder

We created a structured, end-to-end customer journey map in Salesforce Marketing Cloud's Journey Builder, outlining key stages, contact touchpoints, and expected outcomes. Entry and exit criteria were defined based on



Salesforce Flow

Creating Event-Triggered Journeys

Using Journey Builder and Automation Studio, we set up trigger-based enrollment criteria for contacts and opportunities. Journeys were launched based on key actions like form submissions, CRM status changes, and behavioral inactivity.



Salesforce Flow

Building Personalized Communication

We leveraged Salesforce CRM and Contact Builder to sync real-time customer data into SFMC. Furthermore, dynamic content blocks in Email Studio were used for personalized emails based on investment interests, stage, and previous interactions



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Built Scalable Automation Workflows

We developed backend automation to update lists, refresh contact data, and run scheduled campaigns using Automation Studio.

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Setting up Custom Reporting Dashboards.

Using SFMC's native reporting tools and custom dashboards, we implemented journey-level tracking of open rates, click-throughs, conversion rates, and ROI.



Results Achieved



Increase in customer engagement across journey emails



Journey-triggered automation led to faster lead conversion times



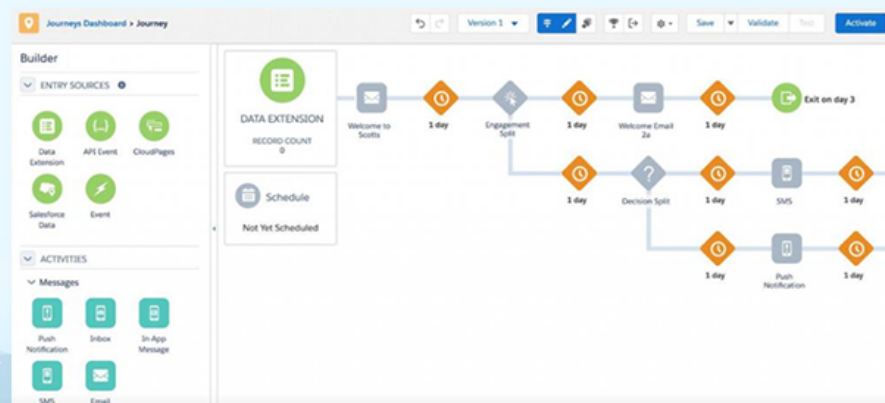
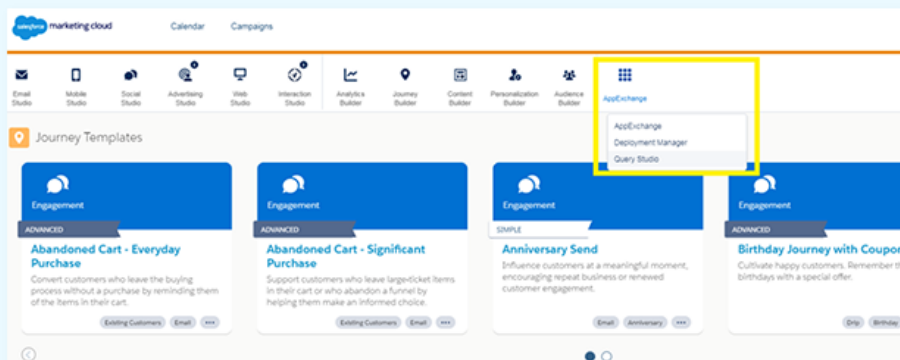
Continuous journey optimization through actionable performance data



Clear, measurable ROI on marketing communications



Reduced manual workload for sales and marketing teams.



Client testimonial

"Everything's more structured now, and it's easier to measure performance."

Amenda Williams

Head of Marketing

About Synexc

Synexc is a new-age Salesforce consulting company specializing in CRM implementation, custom development, system integration, and AI-powered solutions. With clients across the US, Europe, and APAC, we are fast emerging as a global hub for delivering scalable, secure, and business-aligned Salesforce solutions tailored to industry-specific needs.

**Reach out to us for a
Free Consultation Now!**

