

# Improving Salesforce Marketing Cloud journey speed and reporting visibility

Cloud Genii helped a South African insurance services organisation streamline a fragmented Marketing Cloud environment by improving journey setup, conversion tracking, preference handling, reusable configuration, reporting data and operational monitoring.

**TL;DR**

Cloud Genii improved a Salesforce Marketing Cloud environment that was slowing campaign execution and limiting reporting visibility.

The work focused on the operating layer behind customer journeys: journey setup, dynamic configuration, conversion tracking, WhatsApp preference handling, reporting data and monitoring.

The strongest evidenced improvement was that journey build and testing time was reduced from 3 months to 3 weeks.

Overall, the environment became easier to manage, easier to measure and better aligned with day-to-day campaign execution.

<b>Client:</b>	South African insurance services organisation
<b>Industry:</b>	Financial services / Insurance / Digital customer engagement
<b>Service:</b>	Marketing Cloud optimisation and operational remediation
<b>Platform:</b>	Salesforce Marketing Cloud

<b>Journey delivery</b>	<b>Reporting visibility</b>
Build and testing time reduced from 3 months to 3 weeks.	Engagement and conversion data made easier to analyse.
<b>Preference control</b>	<b>Reusable setup</b>
WhatsApp opt-out, blocked-contact and suppression handling strengthened.	Dynamic configuration reduced campaign maintenance friction.

## The situation

The client used Salesforce Marketing Cloud to support digital customer follow-up across several product lines. The environment had to manage email and WhatsApp communications, unconverted customer journeys, conversion tracking, reporting extracts, opt-out handling and operational monitoring.

Over time, the operating model had become fragmented across journeys, data extensions, channel processes and manual configuration steps. The issue was not only campaign execution. The deeper problem was that the environment had become harder to manage, harder to measure and harder to improve.

## What was getting in the way

- Journey setup had become difficult to manage across multiple product lines, which slowed campaign delivery and made changes harder to govern.
- Product-specific tracking and configuration required too much manual effort, increasing the risk of inconsistency between journeys and messages.
- Conversion tracking and reporting visibility lacked the structure needed for dependable downstream analysis.
- WhatsApp preference handling needed stronger control around opt-outs, blocked contacts, inbound replies and suppression logic.
- Operational teams needed earlier warning when critical data stopped moving or when journey data extensions were no longer receiving expected records.

## What Cloud Genii changed

Structured repeatable journey-ingestion patterns so customer records could be routed into the right journey data extensions using clearer product and eligibility logic.

Implemented dynamic configuration patterns so product-specific tracking values, URLs and WhatsApp tracking references could be managed from data instead of being hard-coded repeatedly into individual journeys.

Improved email configuration and send classification alignment for quote-related communication, keeping the work focused on message purpose and operational setup.

Built reporting-oriented tracking structures by extracting and organising Marketing Cloud engagement data into data extensions that could support downstream reporting and analysis.

Strengthened WhatsApp preference handling by using opt-out and failure information to suppress future sends where appropriate and reduce manual oversight.

Added operational monitoring logic to identify when critical data extensions stopped receiving expected data, giving the team earlier warning when data flow or campaign operations needed investigation.

## Salesforce capabilities involved

Salesforce Marketing Cloud	Journey Builder	Automation Studio
Data Extensions	SQL Query Activities	Marketing Cloud data views
Email configuration	Send classification alignment	WhatsApp messaging operations
Unsubscribe and suppression handling	Dynamic configuration	Tracking extracts
Reporting data extensions	Operational monitoring and alerts	Marketing Cloud Next readiness

## What changed

- Journey build and testing time reduced from 3 months to 3 weeks.
- Faster and repeatable campaign execution across multiple product journeys.
- Reduced reliance on manual configuration changes for product-specific tracking and message behaviour.
- Clearer reporting visibility across engagement and conversion signals.
- Stronger WhatsApp preference and suppression handling.

- Better operational oversight through data monitoring and alerts.

### **What this shows**

This case study shows Cloud Genii's approach in practice: fix the operating layer that determines whether Salesforce Marketing Cloud can be trusted day to day. The value was not in cosmetic campaign changes. It was in improving the structures behind campaign execution: journey patterns, configuration, tracking, consent logic, reporting data and monitoring. That is how fragmented marketing automation becomes a manageable and measurable operating system.