

Personalised, Automated Customer Engagement for a Life Sciences Organisation

Replacing fragmented batch-and-blast communication with governed audiences, personalised journeys, and CRM-connected engagement reporting.

Authored by: Parag Bhatt | Salesforce Technical Lead / Senior Developer | 8.5 years of CRM delivery experience

One-liner: We replaced fragmented batch-and-blast email with a connected Marketing Cloud engagement platform — unified audiences, personalised cross-channel journeys, and closed-loop reporting tied back to the CRM — so the right message reached the right contact at the right moment, automatically.

Engagement Snapshot

Client	BioLynx Life Sciences Corporation
Industry	Life Sciences / Healthcare Engagement
Region	Remote delivery for an enterprise client
Salesforce Product	Marketing Cloud Engagement (+ Marketing Cloud Connect to Sales / Service Cloud)
My Role	Marketing Cloud Consultant / Developer
Team Size	Marketing automation pod
Duration	Multi-phase implementation
Key Tools	Journey Builder, Email Studio, Automation Studio, Audience / Contact Builder, AMPscript, Marketing Cloud Connect

1. Project Context

BioLynx Life Sciences Corporation engages a large and segmented audience of customers, providers, and partners across multiple lifecycle stages including onboarding, education, retention, and re-engagement. Communication relevance and timing directly affect adoption, response rates, and downstream commercial performance.

Before the program, communications were managed as manually assembled batch emails with minimal personalisation, disconnected audience lists, and no structured journey orchestration. The marketing team

spent too much time preparing sends, while sales and service teams had little visibility into how contacts were actually engaging.

I was brought in to help establish Salesforce Marketing Cloud as the core engagement platform: unify audience data, design automated journeys, personalise content with AMPscript, and connect engagement data back into the CRM through Marketing Cloud Connect.

2. Problem Statement

The client's engagement model suffered from several issues that limited relevance, efficiency, and measurement:

- **Batch-and-blast communications.** Generic messages were sent to broad lists with limited relevance, resulting in weaker engagement.
- **No journey orchestration.** Touchpoints were not sequenced or triggered by behaviour, so timing and follow-up were inconsistent.
- **Fragmented audience data.** Segmentation relied on disconnected lists rather than a single governed audience model.
- **Manual, repetitive campaign execution.** Each send required manual build and scheduling effort, increasing workload and the risk of error.
- **No closed-loop measurement.** Marketing could not clearly see what worked, and sales/service teams could not use engagement signals in their own workflows.

3. What We Built — The Solution

We implemented a connected Marketing Cloud Engagement platform designed for governed data, personalised communication, and automation at scale:

- **Unified audience model** — structured contact data and data extensions in Contact / Audience Builder as the trusted basis for segmentation.
- **Personalised content with AMPscript** — built dynamic, contact-specific messaging so each recipient saw more relevant content rather than a generic template.
- **Behaviour-driven journeys** — orchestrated multi-step journeys in Journey Builder triggered by lifecycle stage and engagement behaviour.
- **Automated execution through Automation Studio** — scheduled data imports, segmentation refreshes, and sends so recurring campaigns ran without manual effort.
- **CRM connection through Marketing Cloud Connect** — fed engagement signals back to Sales and Service Cloud so downstream teams could act on them.
- **Closed-loop reporting** — provided tracking and performance visibility across audience segments, journeys, and campaign outcomes.

4. My Role on the Engagement

I contributed as the Marketing Cloud consultant and developer, responsible for both the engagement architecture and the hands-on build. My responsibilities included:

- **Solution design** — defining the audience model, journey architecture, and CRM integration strategy.
- **Build and development** — configuring Email Studio assets, AMPscript personalisation, Journey Builder flows, and Automation Studio processes.
- **Data and integration** — modelling data extensions and linking Marketing Cloud back to Sales / Service Cloud through Marketing Cloud Connect.
- **Measurement and enablement** — building reporting views and helping the client's marketing users operate journeys independently after launch.
- **Quality and consistency** — ensuring that content, segmentation, automation timing, and CRM visibility all worked together reliably.

5. How We Achieved It — Delivery Approach

1. **Engagement strategy and lifecycle mapping.** Worked with the client to map customer lifecycle stages and define which automated journeys should support each stage.
2. **Audience foundation.** Built the governed segmentation model in Contact / Audience Builder and structured the key data extensions that powered targeting.
3. **Personalised content.** Created reusable responsive email templates with AMPscript-driven dynamic content for more relevant outreach.
4. **Journey orchestration.** Designed and built Journey Builder flows with entry events, decision splits, waits, and triggered communications.
5. **Automation.** Used Automation Studio to schedule data refreshes, segmentation logic, and recurring send processes so the platform operated with minimal manual effort.
6. **CRM integration and reporting.** Connected engagement data back to Sales / Service Cloud and built reporting so marketing, sales, and service could work from shared insight.

6. Outcomes and Business Impact

The engagement replaced manual campaign execution with a governed, automated customer-engagement platform. Indicative outcomes included:

Personalised	Automated	Unified	Closed-loop
Audience-specific content at scale	Lifecycle journeys running hands-free	Governed audience segmentation model	CRM-visible engagement reporting

- The client shifted from generic blasts to more personalised, behaviour-driven engagement.
- Automated journeys replaced manual, repetitive campaign setup and scheduling.
- A single governed audience model improved targeting consistency.
- Engagement signals became visible to sales and service teams through the CRM connection.
- Closed-loop reporting improved understanding of what content and journeys drove response and conversion.

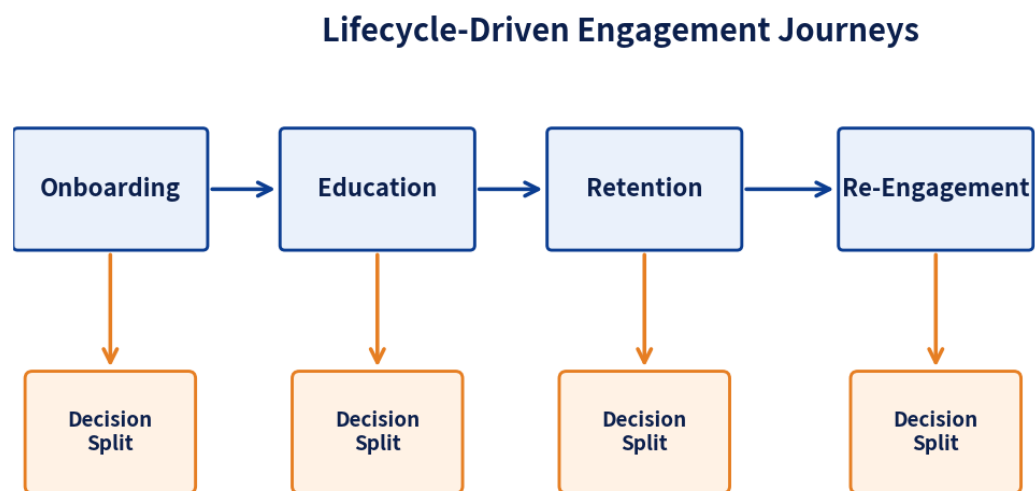
Note: outcomes listed here are representative implementation benefits and can be tailored to measured engagement and conversion figures before publication.

7. Tech Stack

Marketing Cloud Engagement	Journey Builder	Email Studio
Automation Studio	Contact Builder	Audience Builder
AMPscript	Data Extensions	Marketing Cloud Connect
Sales / Service Cloud		

8. Architecture & Process Diagrams

The diagrams below illustrate the core process flows and architecture decisions behind the solution.



Behaviour-triggered Journey Builder flows replacing batch sends

Figure 1 — Lifecycle-driven journeys in Journey Builder with behaviour-triggered decision splits.

Marketing Cloud Architecture

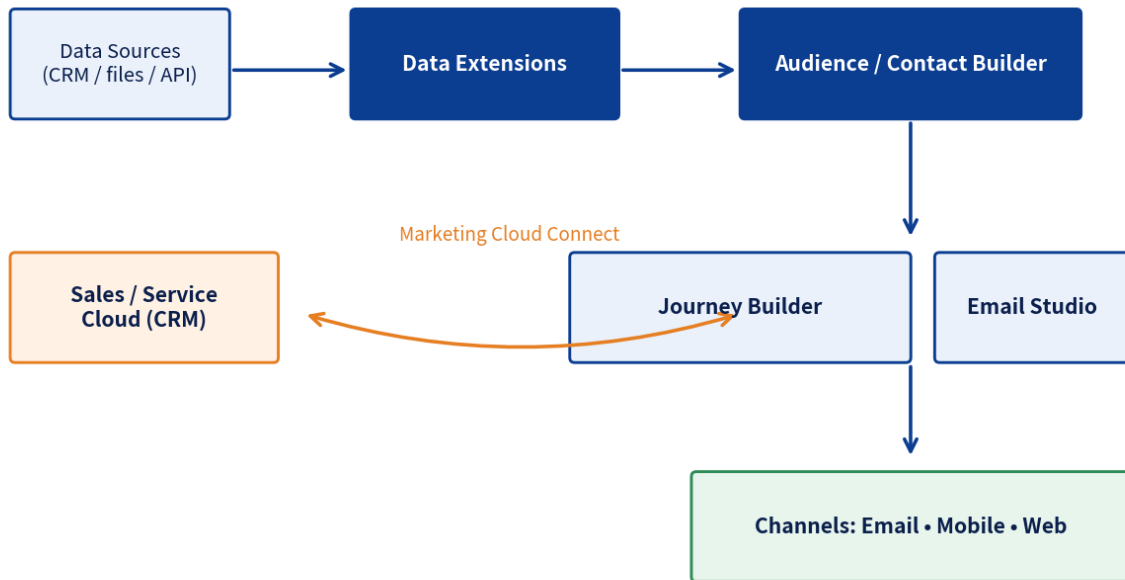


Figure 2 — Marketing Cloud architecture with Marketing Cloud Connect linking back to Sales / Service Cloud.

Personalisation via AMPscript

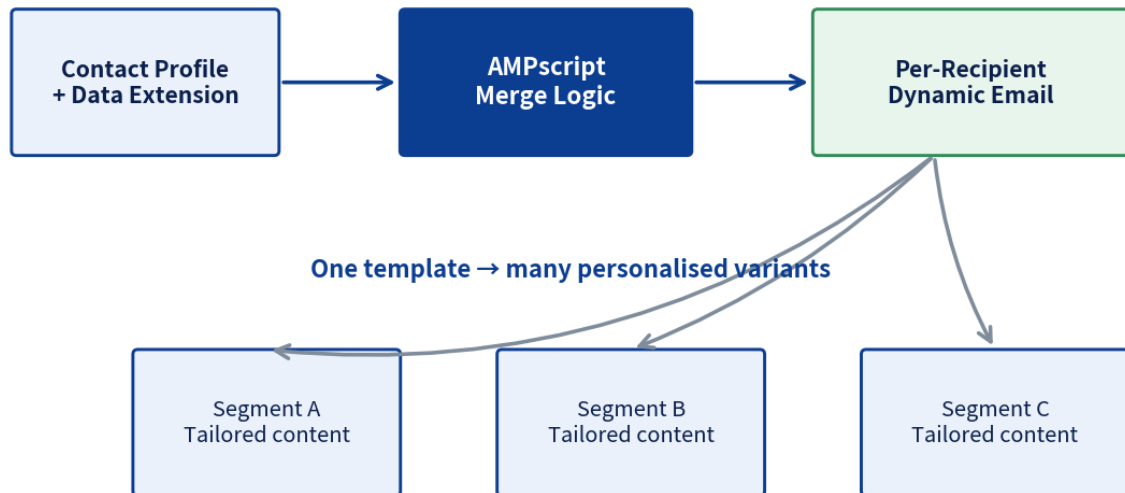


Figure 3 — AMPscript-driven personalisation producing per-recipient variants from a single template.

9. Key Takeaways

- **Personalisation starts with data discipline.** Relevant messaging only became possible once the audience model was structured and governed correctly.
 - **Journeys beat campaigns when timing matters.** Behaviour-driven orchestration delivered a more natural customer experience than one-off scheduled blasts.
 - **Automation creates capacity.** Reducing repetitive manual send preparation freed the marketing team to focus on strategy and optimisation.
 - **Engagement data is more valuable when shared.** Connecting Marketing Cloud back to Sales and Service Cloud made behavioural insight actionable across teams.
-

About the Author

Parag Bhatt is a Salesforce Technical Lead and Senior Developer with 8.5 years of experience delivering CRM transformation programmes across Sales Cloud, Service Cloud, Experience Cloud, CPQ, Revenue Cloud, and Marketing Cloud. He has led offshore and hybrid delivery teams for clients across the GCC, North America, and APAC, with strong hands-on expertise in Apex architecture, automation design, integrations, e-signature, quote-to-cash, and customer engagement platforms.