

salesforce

Marketing Field Guide for the Customer Trailblazer

Power your marketing with the smartest CRM
for 1-to-1 customer journeys.



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What's Inside

Great marketing is about putting the customer at the center of every experience and interaction with a company – across products, sales teams, and service processes. Brands like Uber, Amazon, and Fitbit all do this by delivering 1-to-1 customer journeys.

In the pages ahead, we'll take a look at:

- Marketing in the Age of the Customer
- An introduction to Salesforce for Marketing
- Customer success stories and product features

We're here to help marketers blaze a trail for their customers by driving all aspects of business. That's what makes us the smartest CRM for 1-to-1 customer journeys.

That's Salesforce for Marketing.



The Age of the Customer

Today, your customers expect a 1-to-1 relationship with your brand. Four revolutionary advances have led to shifts in marketing technology:

Cloud Computing

Marketers can create and manage campaigns more quickly than ever without dependence on infrastructure, IT, or outdated technologies.

Mobile Capabilities

Mobile marketing messages, mobile alerts, and apps help marketers create connected customer experiences, drive personalization, and enhance cross-channel campaigns.

Social Media

With identity-based social networks, marketers can collect social data and use it to power ads, recommendations, and customer service – plus drive email subscriptions and app downloads.

Artificial Intelligence

AI can help automate marketing, recommend the next-best product or offer, and collect insights into traffic, sales, service, and marketing metrics along the way.

46+

times the average person checks their phone per day ¹

¹ Deloitte's "Global Mobile Consumer Survey: US Edition" analysis.

44%

of executives believe AI's most important benefit is "automated communications that provide data that can be used to make decisions." ²

² Narrative Science's "2015 State of Artificial Intelligence & Big Data in the Enterprise" research report.



Today's Marketing Challenges



There are five obstacles for marketers in the Age of the Customer:

Isolated Data and Departments

Many companies still have separate business functions that store data, budgets, and software in silos. This makes collaboration – and creating a unified view of each customer – difficult.

Disconnected Experiences Across the Customer Lifecycle

Customers expect 1-to-1 relationships with brands, whether they have just become aware of a product, have been a lifelong advocate, or fall somewhere in between.

Disconnected Channels

Coordinating content and campaigns across disparate channels can be time-consuming and costly. Plus, to deliver personalized engagement, marketers need a complete picture of a customer's behavior across every channel, not just on one.

Disparate Marketing Tools and Analytics

In a time when the world generates more data than ever, marketers need a set of integrated tools to organize that data – and be faster, better, and more predictive with their marketing.

Maintaining Security, Scale, and Availability

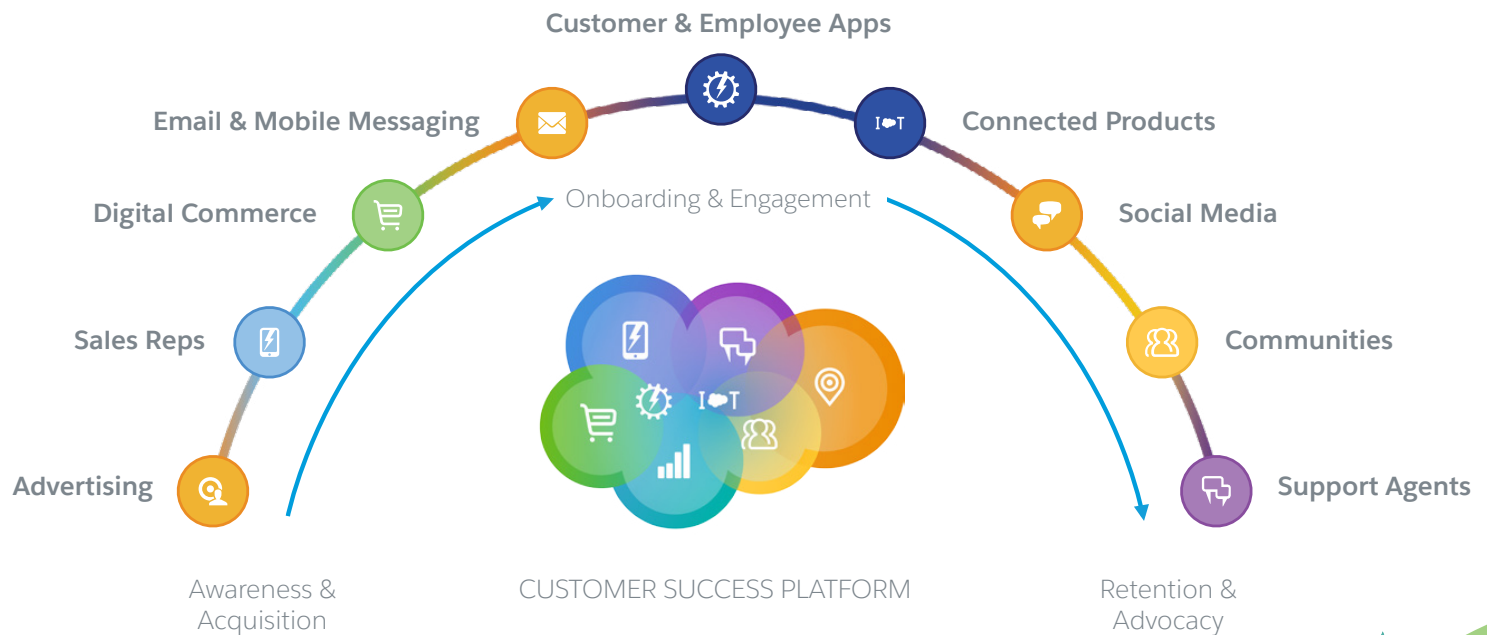
Some marketers are bound by decade-old technology – which makes data security difficult – and customers won't share their information unless they trust that it'll be secure. Plus, marketers need to be able to access that data at any time, from anywhere.

There's one solution to each challenge posed in this chapter:



What Is Salesforce for Marketing?

The Salesforce Customer Success Platform is the only complete and integrated tool set for marketers to engage across sales, service, community, analytics, apps, the IoT, and commerce. Create great customer experiences at every touchpoint with your brand – including marketing, sales, and service interactions.



Meet the Customer Success Platform

Salesforce for Marketing is built on three important aspects of a personalized marketing strategy:

Journey Management

Listen, connect, automate, and analyze each customer's journey at scale. Maximize engagement to drive revenue and ROI.

Artificial Intelligence

Predict the best audience, content, channel, and send-time for every customer interaction – and recommend the best offer – all automatically.

Data Management

Capture data from any source and device. Identify, segment, and activate your audiences, and get a more complete data profile of each customer.

In the next chapters, we'll address each Salesforce solution that marketers can use to take customers all the way from awareness to advocacy – and we'll present a customer success story to match each one.





CUSTOMER JOURNEY MANAGEMENT

Build Personalized Customer Journeys

Personalize every interaction across digital channels – and with your employees and products. Here's how:

Listen for customer cues across all touchpoints with your brand.

Marketers can meet their customers where they are by anticipating – and reacting to – events as they happen.

Connect across one seamless customer experience.

Onboard, engage, re-engage, sell, and support by aligning your strategy across marketing, sales, and service.

Automate 1-to-1 interactions.

Build a strategy once, then offer a unique customer journey for every individual at massive scale – so you can focus on growing your business.

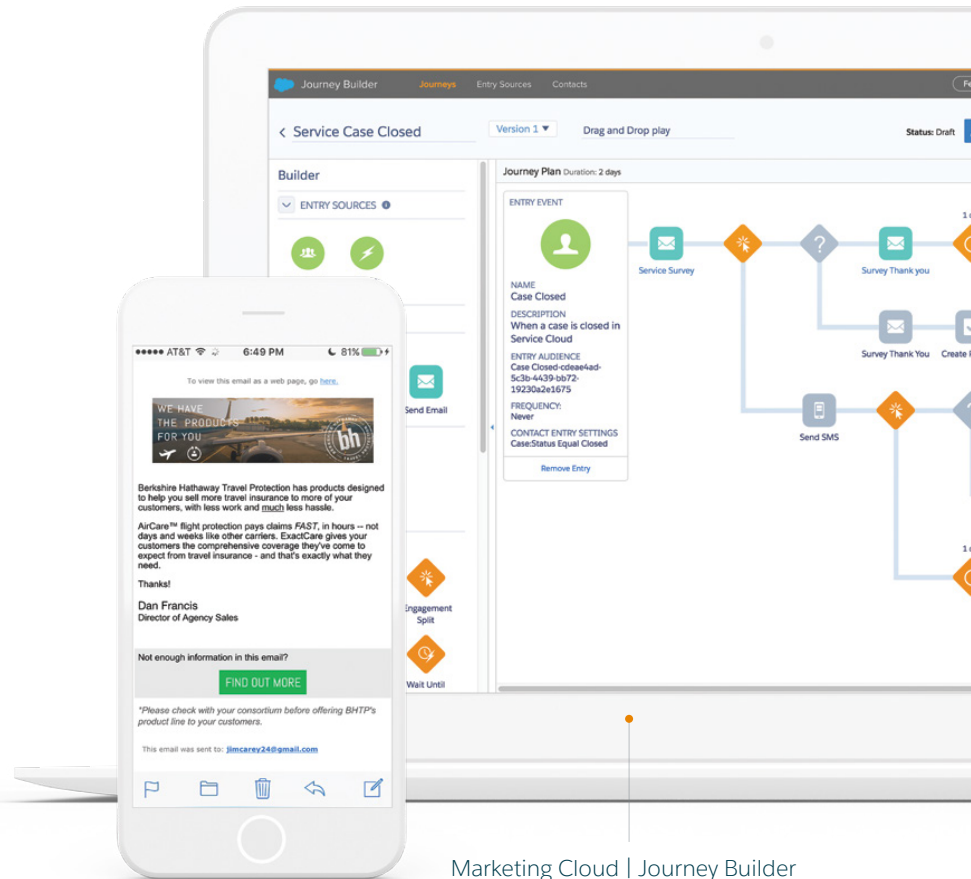
Analyze and optimize as you go.

Remain agile in your marketing by understanding what's working and what's not. Pivot easily when needed, and get the best results as customers evolve.

Learn more about Journey Builder.

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Marketing Cloud | Journey Builder



Spotlight



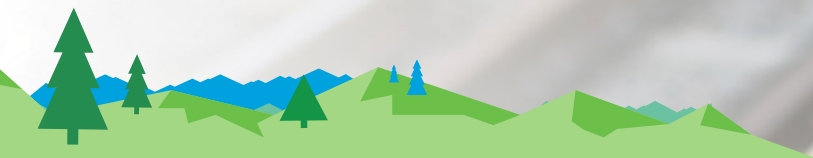
Berkshire Hathaway's sales reps experience a journey to connect human resources, sales, and marketing.

When a potential sales rep visits the Berkshire Hathaway Travel Protection website and signs up to learn more, Journey Builder triggers an email outlining various Berkshire Hathaway benefits. When the recruit interacts with the email, a Sales Cloud opportunity is opened and the individual receives a personal phone call from the team at Berkshire Hathaway to discuss the benefits of selling their products. Once the sales rep joins the team, Berkshire Hathaway stays top of mind by sending regular emails and SMS messages about new products, training opportunities, and the rep's progress toward sales goals.

With Salesforce's journey mapping capabilities, Berkshire Hathaway has seen a 300%–400% increase in the number of travel agencies the sales team can onboard in one week. This will save over two to three months of effort for the sales team each year.

“With Salesforce, we are connecting sales, service, and marketing interactions to create a cohesive and differentiated experience for each customer, based on how they're interacting with the brand.”

BRAD RUTTA
VP of Marketing
Berkshire Hathaway Travel Protection



ADVERTISING

Create Ads That Inspire Action

Drive awareness and acquisition. Here's how:

Capture, unify, and activate your customer data.

Collect data from multiple sources, including CRM, and store it all in one place securely. Build a more complete view of each customer, and power more precisely targeted digital advertising.

Align ad campaigns with other channels.

Use Journey Builder to connect advertising to the rest of business – from your marketing strategy to your sales teams.

Manage campaigns across all digital advertising channels.

Drive sophisticated ad campaigns across search and display, as well as social media advertising.

Capture leads directly from Facebook.

Integrate with the world's largest social media platform to pull leads directly into the Customer Success Platform.

Learn more about Advertising Studio.

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Marketing Cloud | Advertising Studio



Spotlight



Capital One works with Salesforce to connect with small business owners through data-powered advertising campaigns. By gathering customer information from many sources, it delivers a personalized and frictionless lead experience from the first moment of engagement all the way to face-to-face interactions with a banker.

The team at Capital One has a comprehensive data profile for each existing customer. To capture new leads, they created seed audiences of their best customers in Marketing Cloud and securely synced these to the biggest digital advertising channels, including Facebook and Google. Combining these existing profiles with the rich data of channels like Facebook, they were able to create lookalike audiences to target a known set of prospects.

“The beauty of display advertising is that we can find somebody in the context that they want to be in. The Customer Success Platform gives us the opportunity to directly target moments.”

MATT LATTMAN
*Senior Business Director,
Small Business Banking
Capital One*



SALES REPS

Make Marketing That Grows Leads and Pipeline

Help sales close more deals. Here's how:

Grow pipeline with quality leads.

Salesforce can help score your customers based on how they interact with content, and deliver them to sales at the exact moment in the selling cycle when they are most likely to buy.

Accelerate the sales cycle with personalization.

Capture customer information at the point of engagement, segment your customers based on what you know about them, optimize your content for your audience, and deliver the most relevant content to the target buyer.

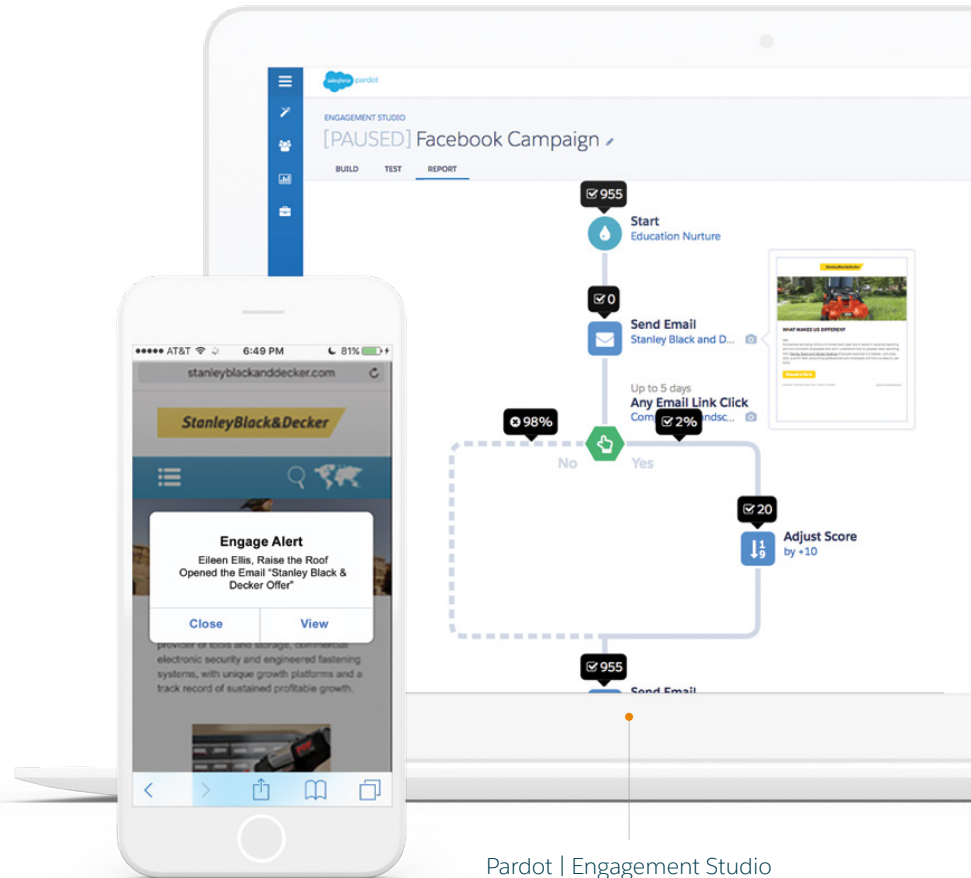
Measure marketing ROI.

Understand marketing influence on revenue when managing your customer lifecycle. Track prospects from lead generation to closed-won deal, and account for every dollar you make – from every dollar you spend.

Learn more about Pardot.

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Spotlight

StanleyBlack&Decker

The team at Stanley Black & Decker, the world's largest tool manufacturer, chose to run their B2B business on the Customer Success Platform due to its depth of functionality. They use segmentation rules to target their audience, and each prospect is added to a nurture program tailored to their interests. Because they're measuring all prospect activities and interactions – website visits, pageviews, email clicks and opens, and more – they know when a prospect is engaged enough to be “sales ready.” This helps their sales reps to focus on the most qualified leads that have the highest chance of turning into sales.

As a result, Stanley Black & Decker reduced the sales cycle for industrial storage and automotive by 30% in the first year of implementation, and another 25% in the second year. 60% of leads were determined not to be sales ready and were sent to nurture instead – and passed to sales only when they were most likely to close.

“Being a customer company is imperative to us. We want to make every customer a brand loyalist for life.”

ROBERT HOLMES
Marketing Director, Mac Tools
Stanley Black & Decker



DIGITAL COMMERCE

Drive Commerce – Anywhere It Happens

Deliver unified shopping experiences, whether online or in your stores. Here's how:

Coordinate shopping experiences across digital channels.

Transform the digital retail experience across all digital channels including, web, mobile, and social.

Execute store transactions and manage store operations.

Deliver point-of-sale capabilities so retailers can execute real-time transactions and manage in-store operations such as sales, returns, and exchanges.

Embed predictive intelligence in offers and communications.

Weave personalization into the fabric of the unified commerce experience through predictive recommendations on the web and via email.

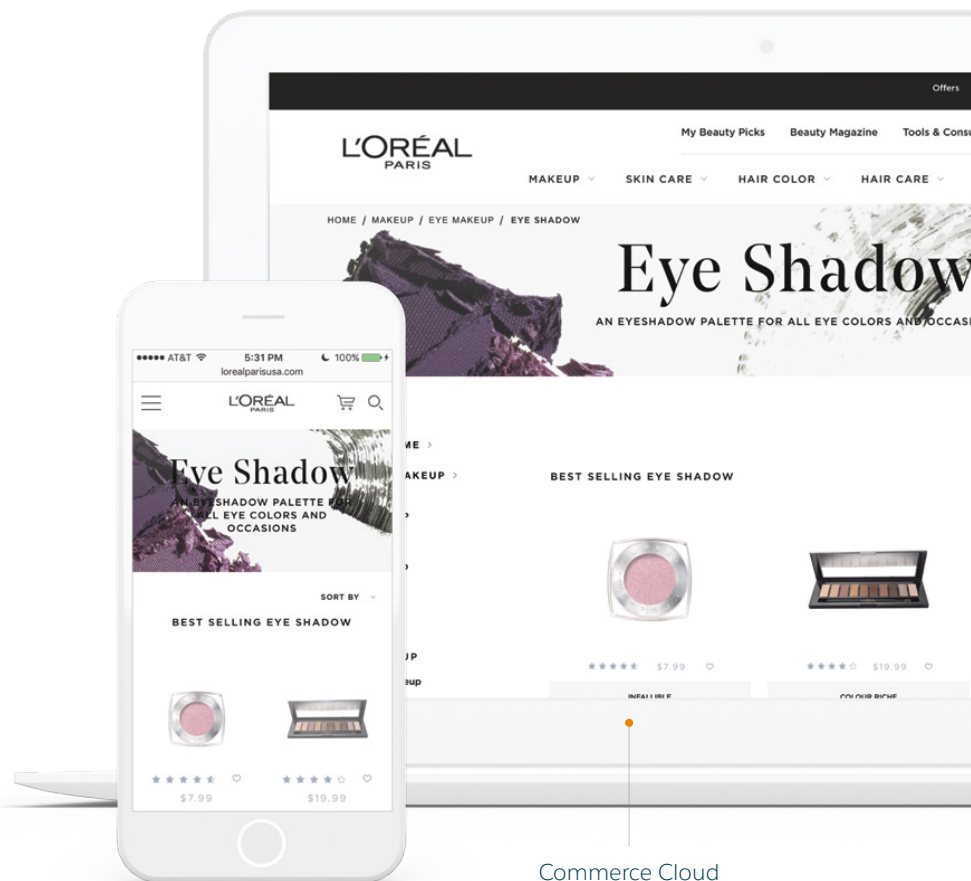
Enhance commerce services to increase satisfaction.

Every client and partner works with the same version of the software – the current version. Salesforce users are part of a large community of peers that share ideas, insights, and inspiration.

Learn more about Commerce Cloud.

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Spotlight

L'ORÉAL®

NYX, a division of L'Oréal, is a digital innovator in the color cosmetics industry. The team at NYX relies on Salesforce to integrate imagery and shoppable videos of real people applying makeup so potential customers can see what an item might look like on them.

L'Oréal is making the e-commerce experience as personal as possible – and it's making the in-store experience more digital. The team crowdsources approved selfies from social media to use in their online store. Algorithms analyze the images for quality, and those that lead to actual sales are flagged as successful and fed back into the system for reuse.

In retail stores, a customer can scan a product barcode with a smartphone to see images that portray that specific product on real people. These pictures are the same user-generated images that an online shopper might see, which creates continuity of content across one digital and in-store experience.

“You could be shopping for a NYX product on your phone and be in a mall and wander into a store, and it's a very seamless experience.”

BERNICE MERLINI
E-commerce Marketing Manager
L'Oréal/NYX Cosmetics

EMAIL MESSAGING

Deliver Email That Delivers Results

Personalize relevant emails at scale, and enjoy the **#1** marketing ROI generator. Here's how:

Build great emails quickly with tools for collaboration.

Store and share pre-approved assets, and set custom approval rules to help teams build engaging emails and campaigns quickly.

Create intelligent messages.

Place relevant content in emails based on customer behavior and attributes using a powerful scripting language and dynamic content.

Adopt a mobile-first mindset.

Create custom templates that make emails look great on mobile devices, where the majority of email subscribers check their messages.

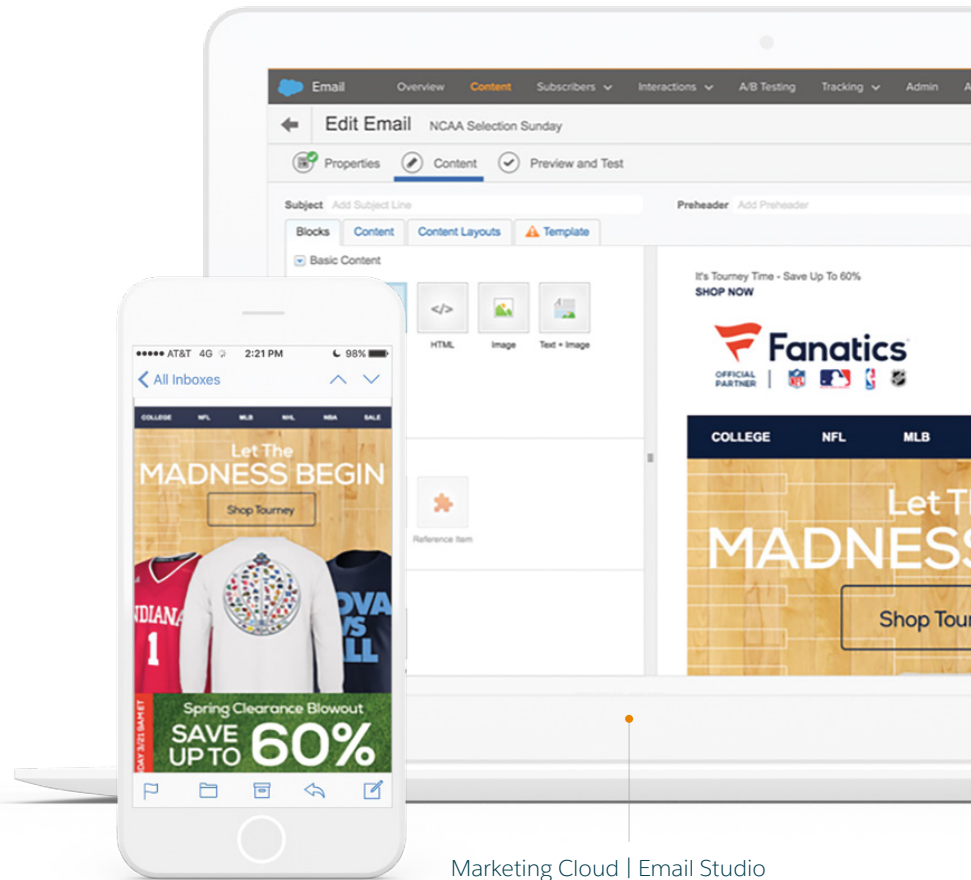
Send millions of messages in minutes.

Whether working with a team of three marketers, or several floors of a large marketing team, create and send personalized emails more efficiently than ever.

Learn more about Email Studio.

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Marketing Cloud | Email Studio



Spotlight



Fanatics' ability to engage with customers around the biggest sporting events, in real time, is unmatched – cementing it as the world's largest online retailer of sports merchandise. The company uses Salesforce to personalize email campaigns at scale. "Multiply a thousand teams by an endless stream of sports news, and you've got billions of emails being sent to fans each year," said Jonathan Wilbur, Director of CRM.

With Salesforce's templates and tools, including AMPscript for dynamic content, the team at Fanatics can seize the moment when big sports news breaks. They built scripts that search customer data to display fans' favorite teams, pull in real-time scores and stats from vendor feeds, and personalize branding using partner IDs. The result is campaigns customized according to multitier segments. In other words, Fanatics delivers merchandise that's relevant to their customers and their favorite teams – at the right time.

“We're actually able to stand up a campaign in a matter of minutes. In 2015, we sent about 3.5 billion messages.”

JONATHAN WILBUR
Director of CRM
Fanatics

MOBILE MESSAGING

Connect in Moments That Matter with Mobile

Send alerts based on customer behavior and actions through SMS, in-app push notifications, and group messaging. Here's how:

Link your mobile strategy with other channels.

Use mobile strategies to drive email subscriptions. Increase fans and followers on social networks, and inspire visits to your website or online store.

Send time-sensitive alerts or reminders instantly.

Send notifications of a promotion or sale, and respond in an instant to trends in your industry with relevant mobile content.

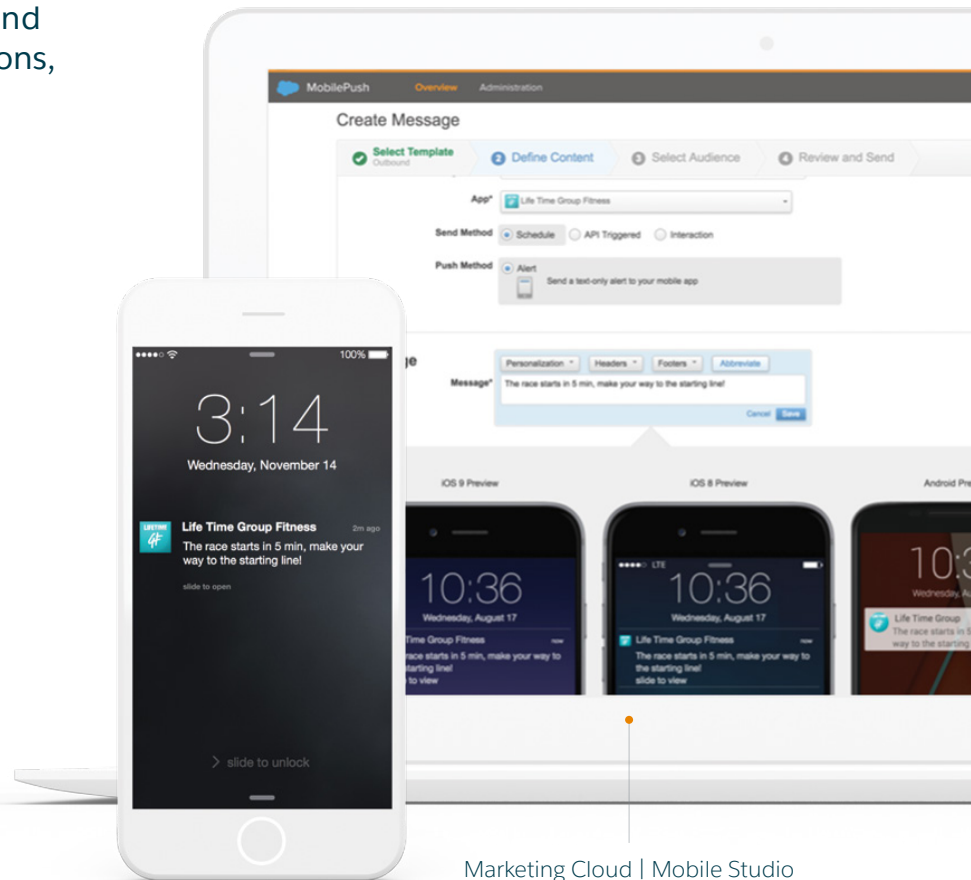
Target customers based on geofencing technology.

Engage customers when they're closest to you by using geofencing technology to send messages based on their proximity to your store or event.

Learn more about Mobile Studio.

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Spotlight

LIFE TIME™

THE HEALTHY WAY OF LIFE COMPANY

Life Time, the Healthy Way of Life Company, is transforming the way it communicates, employing a seamless multichannel experience that uses member data to create personalized communications, netting a 154% ROI.

Each of Life Time's members have unique fitness goals. For example, if a member comes in with her two children, the team at Life Time knows that they need to be able to communicate differently with her than with someone who is training for a triathlon. Each of those members has a unique journey and needs different information to achieve their health objectives, athletic aspirations, and fitness goals.

“The content of every communication via email, online, mobile texts, or mobile notifications are helping [customers] walk through that journey to get them to where they personally want to go.”

RENEE MAIN

VP

Marketing, Member Acquisition, and Retention
Life Time



CUSTOMER MOBILE APPS

Build Apps Lightning Fast

Build interactive apps quickly to drive customer engagement. Here's how:

Build, deliver, monitor, and scale apps on a cloud-based platform.

Build apps quickly on the leading cloud application platform.

Drive loyalty and commerce.

Increase engagement by rewarding your best customers, and use customer data to power sales promotions through branded app experiences.

Integrate all Salesforce data to deliver more personalized app experiences.

Use customer data from sales, service, and marketing to power messaging in mobile apps. Tailor relevant push notifications, offers, products, and more.

Learn more about App Cloud.

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App Cloud | Heroku



Spotlight



With the Red Robin Royalty app powered by Salesforce, the restaurant offers standard rewards, such as free burgers or coupons, as well as exclusive, fun rewards tailored to the individual. For example, elite customers might get invited to tour a new restaurant or try a new menu item before the general public. Or, mothers might be invited to a special meal on a day in May.

Additionally, Red Robin delivers a great customer experience to millions of Royalty program members by giving internal teams access to all the member data they need, with a “single point of truth” view for each customer.

“Salesforce truly makes this whole thing fly. If we didn’t have that, I can’t even fathom the effort it would take to build it ourselves.”

EVAN EAKIN
Vice President, IT
Red Robin



Make Marketers Faster and More Productive

Turn your marketing team into a high-performing, efficient machine. Here's how:

Increase employee collaboration.

Use out-of-the-box apps such as group chat, docs, spreadsheets, and file sharing to inspire planning and collaboration. Inspire employee communication across all departments.

Learn more about Qip.

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Boost productivity with apps from the #1 business app marketplace.

Install and configure thousands of apps with ease. Get more done, no matter the size of your marketing team.

Learn more about AppExchange.

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Build custom marketing apps with clicks or code.

Create, manage, deploy, and optimize apps with ease for budgeting, events, PR, and campaigns. Build with drag-and-drop tools or open frameworks to be more efficient – and more effective.

Learn more about Force.com.

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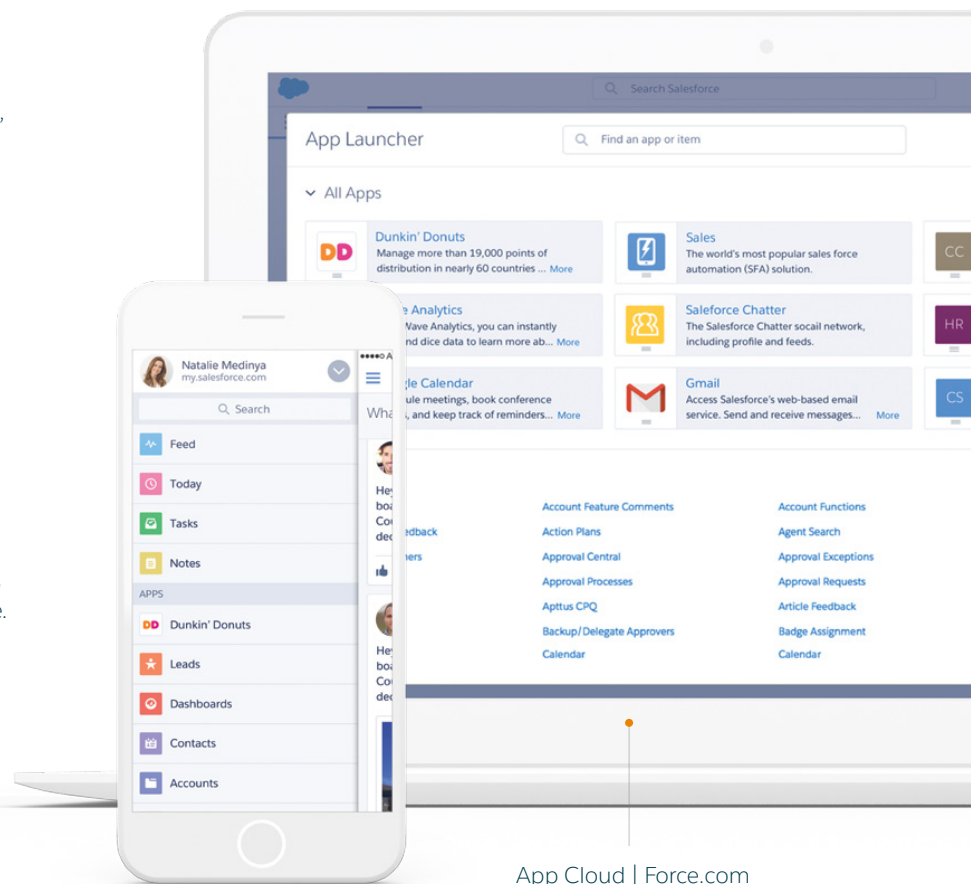
Run marketing from anywhere.

Stay up-to-date on your marketing efforts at all times, from anywhere, and take actions within campaigns such as pause, resume, cancel, approve, and send.

Learn more about the Marketing Cloud mobile app.

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Spotlight



Dunkin' Brands has earned the No. 1 ranking for customer loyalty in its category for nine years running, and it's out to make the guest experience even better. Technology has transformed the way Dunkin's customers interact with it, and the marketing team knows that customer expectations are higher than ever. The team at Dunkin' knew that improving the customer experience needed to start internally.

Dunkin' began by building an internal franchise approval process on Salesforce and has grown into multiple other applications built on the Customer Success Platform, including apps for their media buying team and legal team. Plus, Dunkin' has transformed the application for someone signing up as a franchise owner. The process is now automated for scale and presents an easy, seamless experience to the franchiser.

“ We have to build a very focused, personalized 1-to-1 journey with our consumers – a way to reach them with the right offer, at the right time, at the right place. Salesforce helps us deliver that. ”

SCOTT HUDLER
Chief Digital Officer
Dunkin' Donuts



Make Data-Driven Decisions

Help your team perform with an informed view of your strategy, results, and the ability to optimize as they go. Here's how:

See marketing's direct impact on revenue.

Tie marketing to sales outcomes by storing and displaying all data in one place with visual, customizable dashboards.

Access your data with ease.

Explore multiple data sources to intelligently improve campaign performance in the moment it's needed.

Act quickly on your insights.

Share your thoughts from any device and quickly take data-driven actions as a team to maximize engagement – and ultimately increase ROI.

Learn more about Analytics Cloud.

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Spotlight

Cox
AUTOMOTIVESM

Cox Automotive is the world's leader in vehicle remarketing services and automotive digital marketing and software – with a portfolio of brands including AutoTrader, Manheim, Kelley Blue Book, and many others. The team at Cox had a legacy system in place for data management, but their business was growing, and they needed a better and faster way to report on marketing results. They aimed to keep data management simple and be able to innovate for scale, all while embracing the lifecycle of their marketing tools.

Cox Automotive chose Salesforce for its extremely robust analytics platform that seamlessly integrates with third party data sources. Cox gained the ability to see marketing insights in seconds – not days or weeks. The team at Cox Automotive leverages their Marketing Cloud data in Wave to evaluate marketing performance, track customer touchpoints across their various business units, and make fast, insightful decisions that drive their business.

“We needed to bring our brands together to create a 1-to-1 relationship with our dealers. Salesforce helped us make it real.”

REBEKAH KING

*Senior Manager, Marketing Systems
Cox Automotive*



CONNECTED PRODUCTS

Transform Products into Connected Experiences

Enable connected products with the internet of things. Here's how:

Connect to any data source at massive scale.

Capture billions of events from any connected product, service, device, or app.

Create customer journeys through connected products.

Build real-time logic to create journeys that cross sales, service, and marketing.

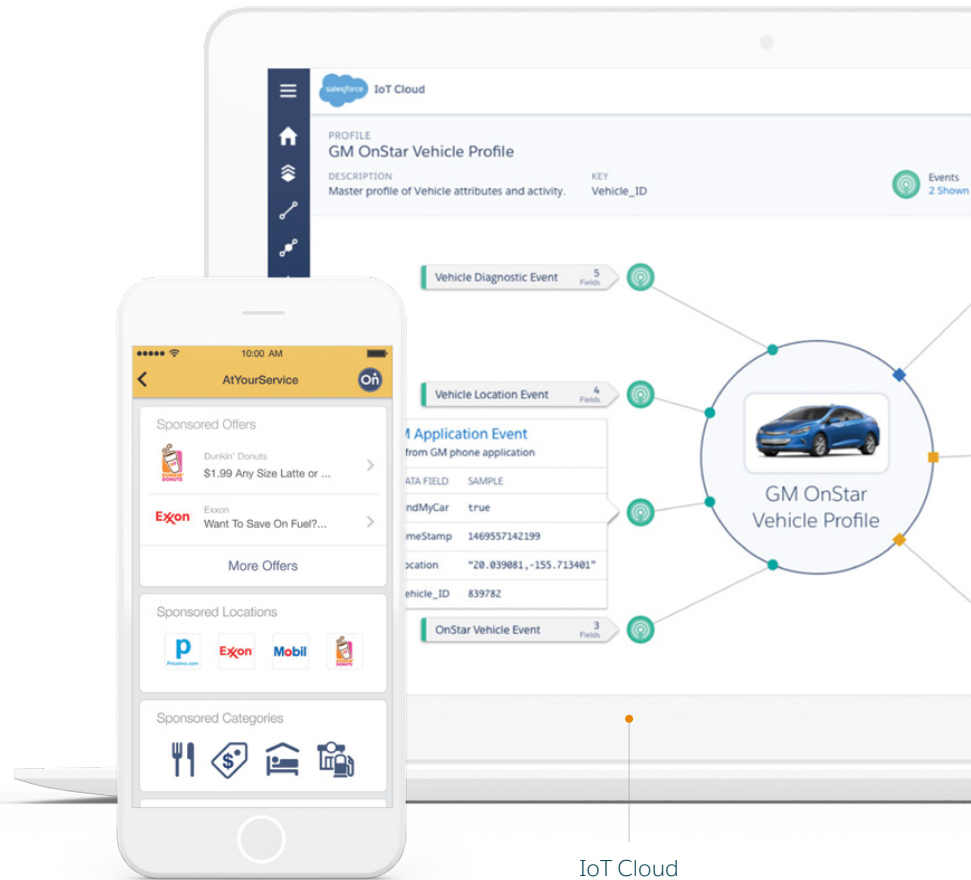
Send proactive, real-time messages to every customer at the right moment.

Re-engage customers who have stopped interacting with your product, or respond to a recent surge in product engagement by sending the right message at the right moment.

Learn more about IoT Cloud.

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Spotlight



GM OnStar has evolved from a safety and security service to a comprehensive connected car experience. The team at OnStar has embraced the power of 4G LTE connectivity to enhance each driver's experience. They chose Salesforce to collect vehicle data, assess driver behavior, power predictive offers and product recommendations, and to reach their mobile customers in the right moment – wherever they are.

For example, when using OnStar's AtYourService feature, drivers can see nearby suggestions for restaurants, shopping centers, gas stations, and more. Customers can set their preferences, and OnStar partners with businesses to deliver relevant offers to drivers when they are within a certain distance of their favorite places.

“We chose the Customer Success Platform because it was very simple to bring communities of merchants together with our millions of consumers who are driving in 4G LTE-connected vehicles.”

MARK LLOYD
Consumer Online Officer
GM OnStar



SOCIAL MEDIA

Turn Social Fans and Followers into Loyal Customers

Engage prospects and customers on social while promoting cross-channel campaigns. Here's how:

Listen to the social conversation.

Analyze social conversations from millions of different sources with social media monitoring software. Discover what customers are saying about your brand, products, and competitors.

Publish across multiple social networks.

Plan, schedule, publish, and promote social posts across multiple accounts and networks. Create and approve content, route for approval, and publish relevant messages at the right moment.

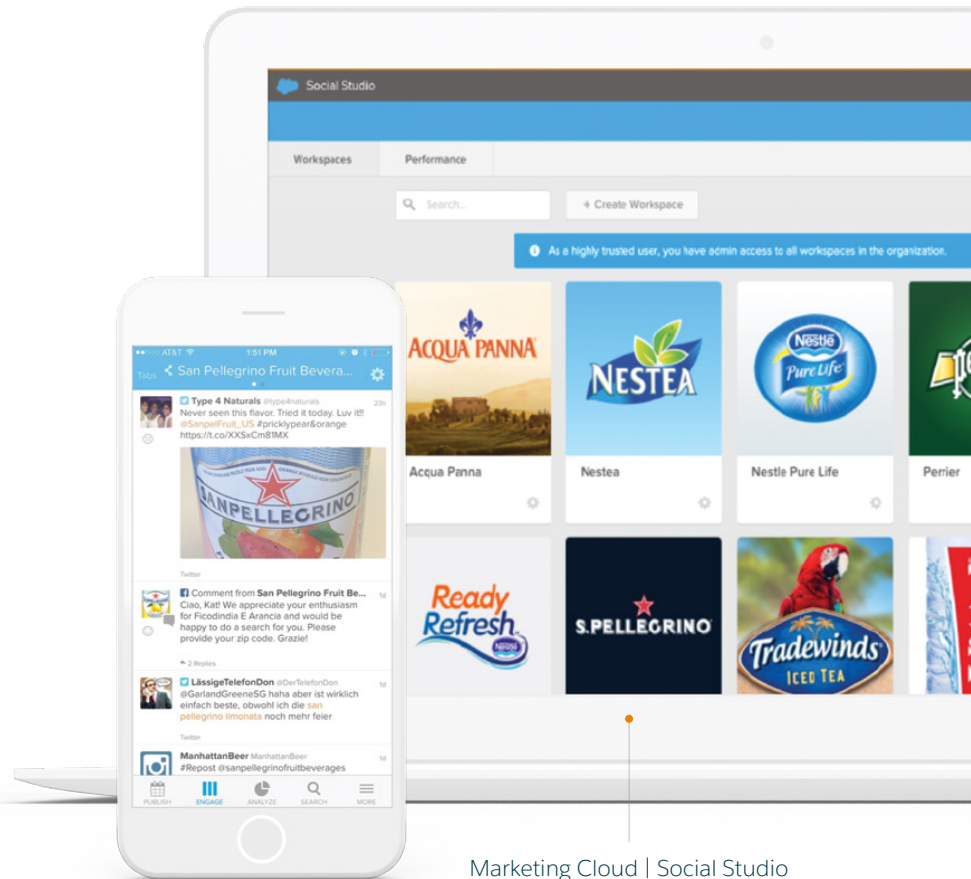
Engage with fans and followers – from anywhere.

Manage social strategies from anywhere, anytime, with the Social Studio mobile app.

Learn more about Social Studio.

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Marketing Cloud | Social Studio



Spotlight



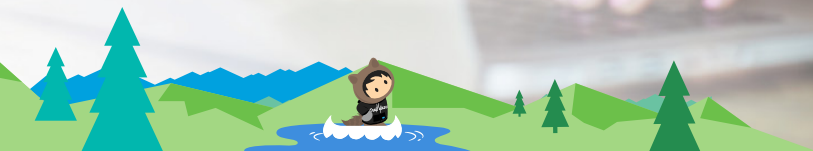
From conversations on Facebook and Twitter to digitally connected coolers in grocery stores, the team at Nestlé Waters is reinventing consumer engagement in the digital age. They use Journey Builder and predictive intelligence to personalize experiences for millions of customers.

The team at Nestlé Waters uses Salesforce to manage its content marketing efforts, drive traffic and leads to their e-commerce business, and create amazing customer experiences through social engagement. They use a marketing command center that tracks their brands, millions of customer interactions, and all marketing campaigns.

“This is not about marketing and sales. It’s about holistically managing the relationship with our consumer across brands and functions.”

ANTONIO SCIUTO

*Global Head of eCommerce, CMO, and eBusiness Leader
Nestlé Waters North America*





COMMUNITIES

Build Communities That Bring People Together

Create branded online community experiences for customers, partners, and employees to engage. Here's how:

Build and launch a mobile engagement hub quickly.

Create a branded environment for your customers and employees to engage and interact with each other, from anywhere.

Recognize and reward your most valuable members.

Use badges and leaderboards to recognize your brand loyalists, and remind them of their importance to the success of your company, brand, and products.

Deliver personalized content, products, and services in a branded environment.

Tailor every communication in a closed-access online community to maximize engagement and conversions.

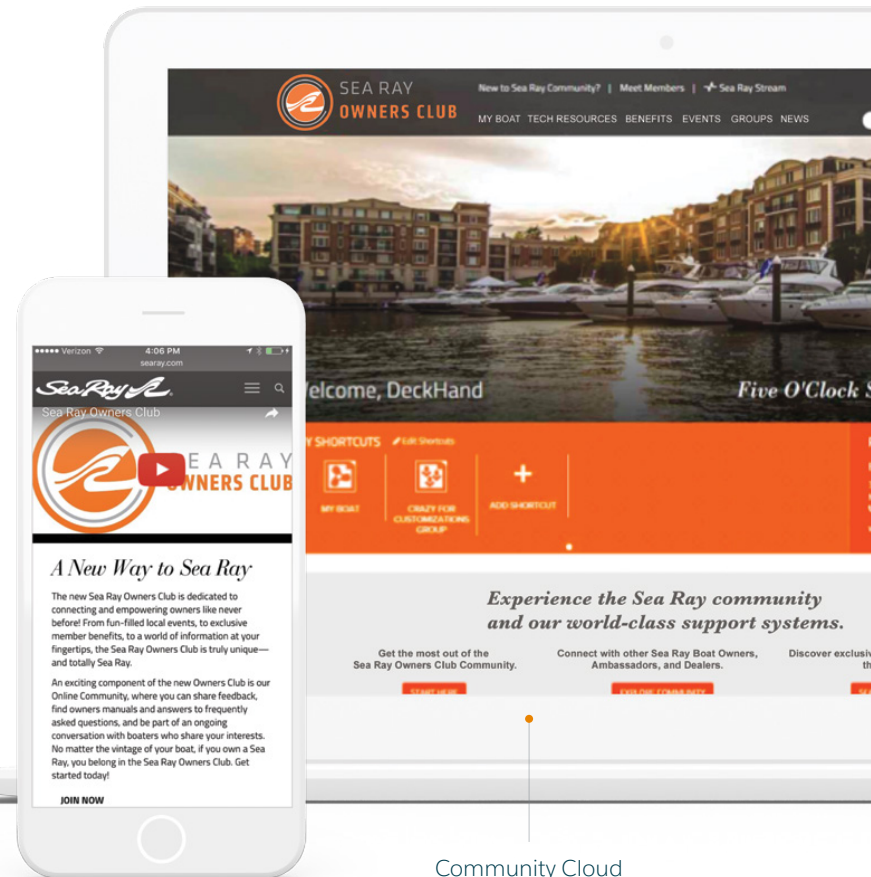
Intelligently guide customers to the experts, articles, and support they need.

Anticipate and prepare for customer concerns before they arise by listening to the conversation in your branded community.

Learn more about Community Cloud.

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Community Cloud



Spotlight

Sea Ray®

Sea Ray, the world's largest manufacturer of superior-quality pleasure boats, uses Salesforce to power an online destination for the Sea Ray Owners Club that highlights events and self-service resources.

The team at Sea Ray can seamlessly connect detailed watercraft data and sales, marketing, and customer service information to the customer experience in the community through each boat owner's unique hull identification number. With integrated access to owner data, Sea Ray representatives can work with customers to facilitate quick boating help, answer equipment questions, and contact preferred dealers on their behalf.

The online Owners Club community also consolidates storage of boating documentation such as manuals, technical resources, and FAQ. In the site's first three months, the team at Sea Ray saw the company's highest customer time spent on-site ever. Boat owners engage with the brand longer and more frequently through the community, returning to see what's new and to engage with other community members and Sea Ray employees.

“Salesforce is a robust, up-to-date database for all boat-owner information, so staff and customers can now find the answers they need in one easy place. We now have so much more to offer as part of this online community.”

SHELBY KIRBY
Senior Marketing Manager
Sea Ray



SERVICE AGENTS

“Wow” Them With Customer Care

Turn every service interaction into a reason to love your brand. Here's how:

Store all marketing, sales, and service data in one contact record.

Create a single view of every customer, so everyone from service agents to sales reps can know your customers like never before.

Listen for service activities, and follow up with the right message across channels.

Predict customer concerns, and proactively address them with marketing messages that reach the right customer, in the right moment.

Automatically open or close service cases based on customer behavior.

Monitor customer activity and automatically respond with highly customized communications based on each customer's behavior and attributes.

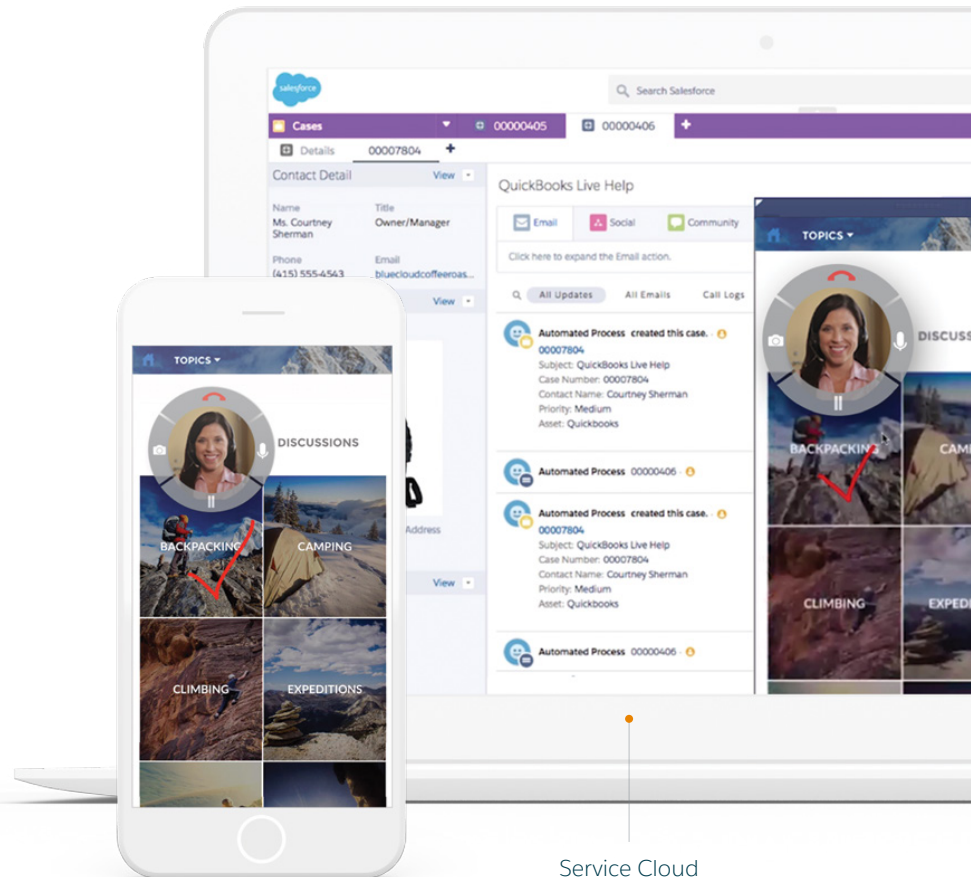
Message appropriately to customers with open service cases.

Monitor service cases to avoid overmarketing to those with concerns, and automatically reduce messaging for prospects and customers who aren't ready to receive them.

Learn more about Service Cloud.

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Service Cloud



Spotlight



American Express's Global Corporate Payments division is revolutionizing customer service for corporate accounts. By processing the business world's payments, American Express gets a broad view into client spending patterns – and Salesforce helps turn that data into insights that drive marketing and customer service strategies.

"American Express wants to take service into the 21st century by redefining what it means," said Susan Sobott, president of Global Corporate Payments. "The way we redefine it is by being so real-time and so in the know that we can actually anticipate what customers need." For the Age of the Customer, that means using data to help customers solve problems and make key business decisions.

“The power for us is the information we have, the trust we have with our customers, and our employees' ability to deliver on that. Salesforce enables us to connect these dots.”

GREG KEELEY
*EVP of Global Corporate Payments
American Express*

Summary

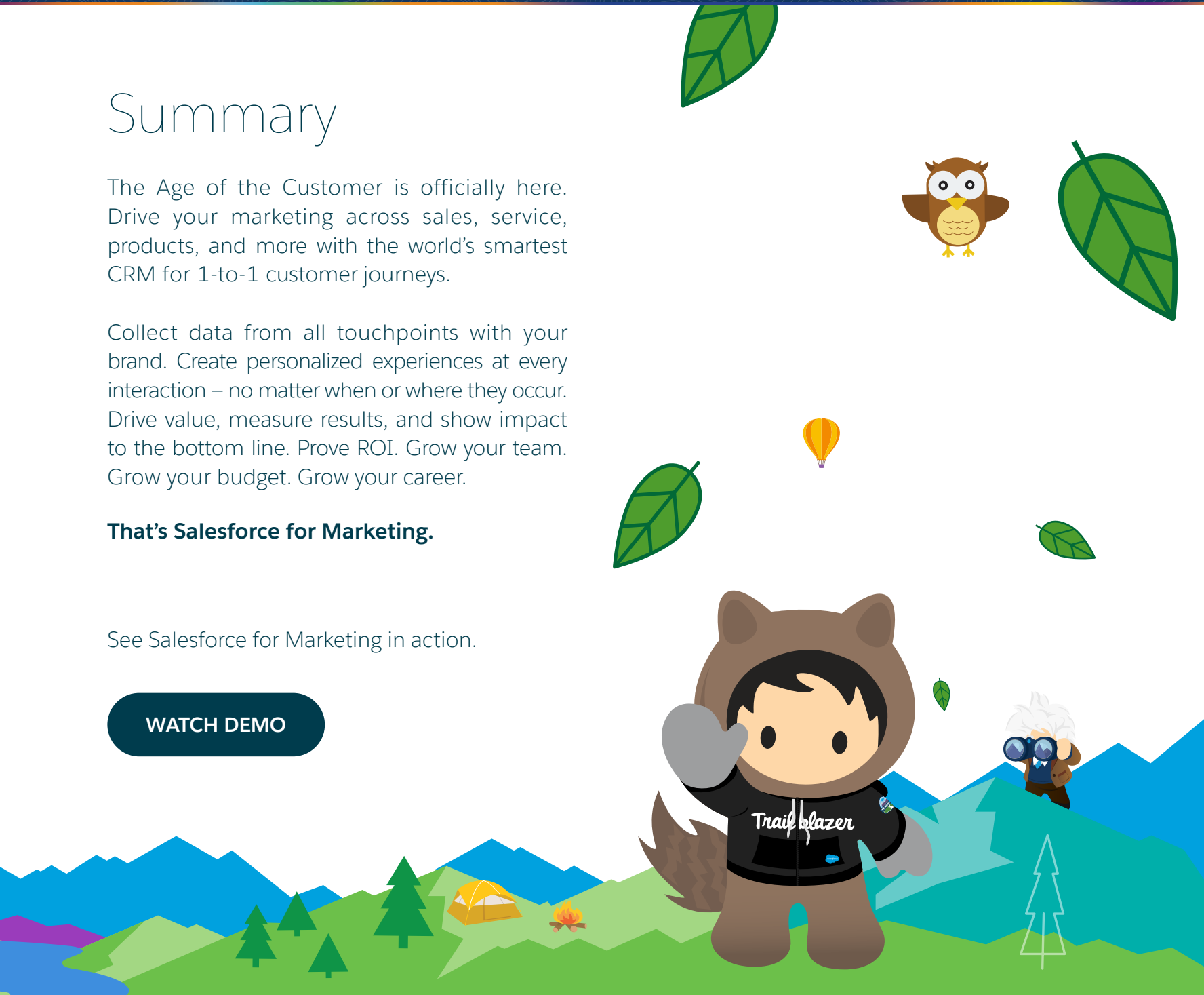
The Age of the Customer is officially here. Drive your marketing across sales, service, products, and more with the world's smartest CRM for 1-to-1 customer journeys.

Collect data from all touchpoints with your brand. Create personalized experiences at every interaction – no matter when or where they occur. Drive value, measure results, and show impact to the bottom line. Prove ROI. Grow your team. Grow your budget. Grow your career.

That's Salesforce for Marketing.

See Salesforce for Marketing in action.

[WATCH DEMO](#)





salesforce

CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY



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