# Deliver Seamless Journeys to Financial Services Customers

Salesforce, Spring '24


@salesforcedocs

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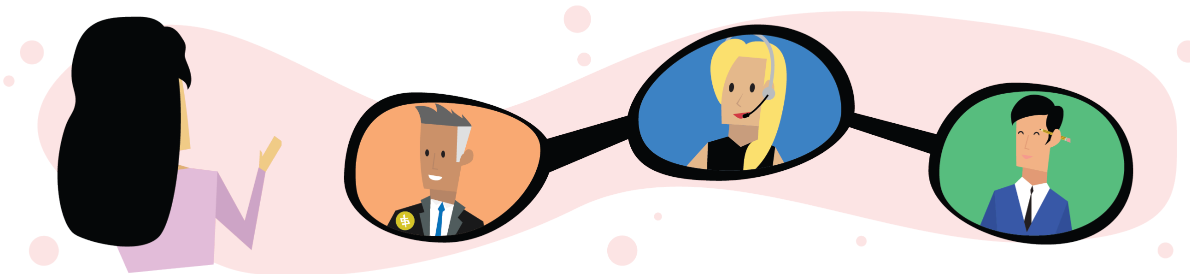
# DELIVER SEAMLESS JOURNEYS TO FINANCIAL SERVICES CUSTOMERS

Use Marketing Cloud tools and journeys to acquire, onboard, and engage financial services customers.



## Get Started

| | |
|---|---|
| | Explore system architecture related to this solution.<br>• Industry Blueprint for Retail Banking<br>• Reference Architecture for Retail Banking<br>• Solution Architecture for Retail Banking |
| | Take Trailhead modules related to this solution.<br>• Salesforce Solution Kits: Quick Look |

This kit provides a starting point in onboarding Financial Services clients. Use Salesforce data and Marketing Cloud tools to offer personalized journeys. Interact with customers based on profile, interests, preferences, behavior, and needs. Deliver 1:1 digital experiences to end consumers with personalized content across channel and device.

Deploy personalized and relevant journeys to engage with bankers, agents, and advisors. Interact during all phases of the financial agent's lifecycle, from onboarding new employees to on-going engagement and enablement.

This solution kit helps you:

- Deploy customer and employee journeys quickly using Salesforce data.
- Give your customers and agents a personalized and connected experience.
- Gain insights into your customer's interests, needs, and preferences.
- Increase engagement, wallet share, and productivity.

## Required Products

- Salesforce CRM, such as Financial Services Cloud, Sales Cloud
- Salesforce Scheduler for scheduling appointments

- Marketing Cloud with Journey Builder
- Marketing Cloud Connect Managed Package
- Deployment Manager on AppExchange

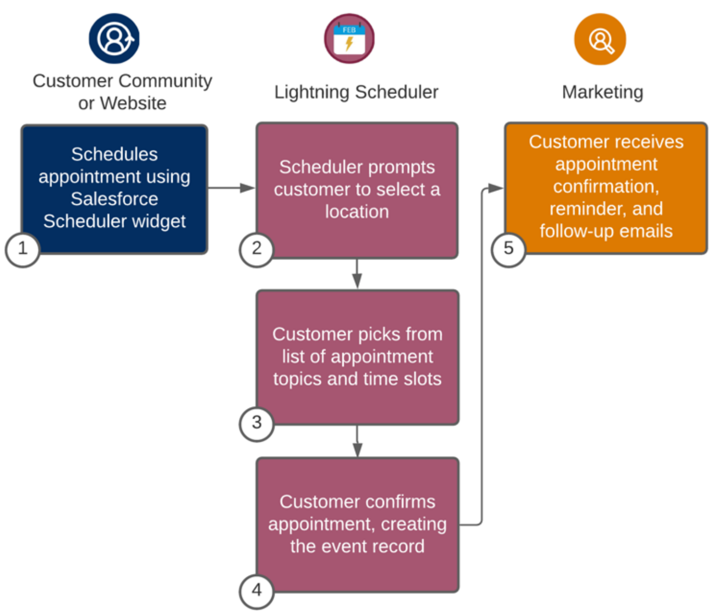
# Implement This Solution



# Workflow

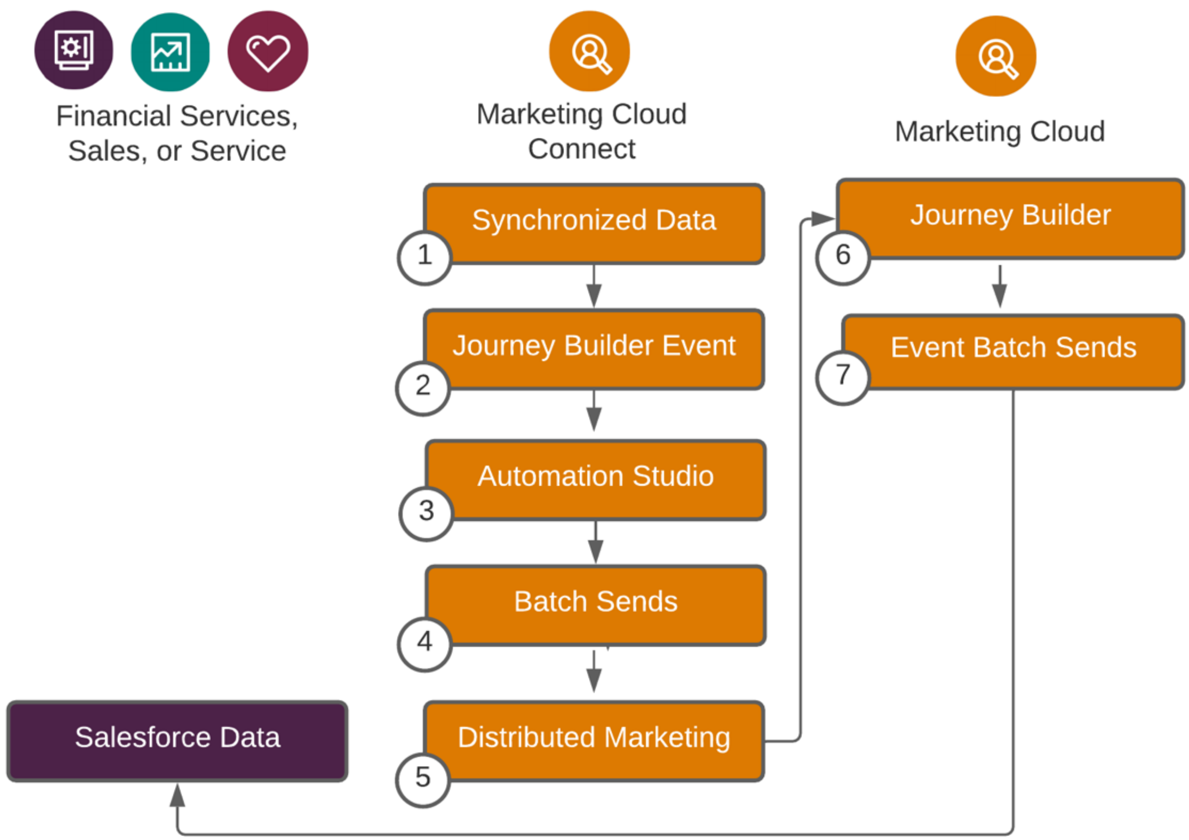
Learn how data flows through the configurations when you deliver seamless journeys to financial services clients.

## Workflow




1. The customer schedules an appointment using the Salesforce Scheduler widget.
2. The Scheduler prompts the customer to select a location.
3. The customer picks from a list of appointment topics and available time slots.
4. The customer confirms the appointment, creating the event record.
5. The customer receives appointment confirmation, reminder, and follow-up emails.

# Understand the Flow of Data




1. Synchronized Data asynchronously runs and supports adds, updates, and deletes. The data supports standard objects, custom objects, and community users.
2. Journey Builder Event includes data from Salesforce streaming into Journey Builder. The event supports adds, updates, standard objects, custom objects, and community actions.
3. Automation Studio runs manually or on a schedule. The studio supports adds, updates, overwrites, reports, standard objects, and custom objects.
4. Batch Sends to Campaigns or Reports runs manually or on a schedule. The batch sends support campaigns and reports. This option represents a legacy integration.
5. Experience Cloud and Marketing Cloud Integration with Journey Builder supports 1:1 sends, email, SMS, multi-step, and multi-channel campaign sends.
6. Journey Builder injects real-time customers into a journey based on any data or action in Salesforce (option 2). The builder supports updating Salesforce with native Salesforce activities, account, campaign, member, case, contact, lead, convert lead, opportunity, task, and an object activity (catch-all for any object).
7. Marketing Cloud batch sends engagement metrics and object-specific updates back to Salesforce.

## Related Content

Take the next steps in this implementation.

- Design Considerations
- Configurations

# Design Considerations

Keep these design considerations in mind when you deliver seamless journeys to financial services clients.

Before configuring these journeys in Marketing Cloud, create the recipients in Salesforce with a record ID. This action allows Marketing Cloud to pass engagement data back to the record in Salesforce and avoid problems like not being able to join marketing and sales data.

## Marketing Cloud Connect

The Marketing Cloud Connect managed package combines the digital marketing capabilities of Marketing Cloud with the data management, segmentation, and campaign management tools in Salesforce. When installed, you can create and execute 1:1 customer journeys using the rich data captured in your Financial Services Cloud org and access powerful Marketing Cloud tools directly within Salesforce.

Use this connector to:

- Automatically add customers to journeys based on the underlying Salesforce data and centrally managed decisioning criteria.
- Trigger Salesforce events such as task creation based on engagement or lack thereof in Journey Builder.
- Synchronize select customer and producer information between Salesforce CRM and Marketing Cloud.
- Synchronize Marketing Cloud-CRM subscriber status.
- View email tracking data at the client and aggregate level in CRM.
- View and report on Journey Builder engagement data.

## Deployment Manager

Use Marketing Cloud's Deployment Manager on AppExchange to quickly deploy the journey snapshots Salesforce provides by dragging and dropping a JSON file into the Marketing Cloud app. In addition to deploying journey snapshots, Deployment Manager allows you to quickly copy:

- Data extensions
- Attribute groups in the Contact Builder data model
- Automations in Automation Studio

## Related Content

Review earlier steps in this solution.

- Workflow

Take the next steps in this implementation.

- Configurations

SEE ALSO:

Marketing Cloud Connect Documentation

Deployment Manager App Download

Deployment Manager Documentation

Journey Builder Documentation

# Configurations

Use these configurations to deliver seamless journeys to financial services clients.

## Create Marketing Cloud Journeys

These steps assume that you completed the product and pricing setup and reviewed or implemented quote to cart solutions. Synchronize products and price lists between B2B Commerce and CPQ.

**Step 1: Download journey snapshot JSON files from GitHub**

Log in to GitHub, and then download the journey template JSON files from Salesforce's GitHub site.

**Step 2: Use Deployment Manager to deploy the snapshot**

1. In Marketing Cloud, navigate to AppExchange, and then go to Deployment Manager.
2. Select **Deploy Snapshot**.
3. Drag the JSON file from GitHub onto the screen, click **Deploy**, and then confirm the deployment.

**Step 3: Configure the Journey Entry event**

1. Navigate to Journey Builder.
2. Click the **Salesforce Scheduler Appointment** journey created by the Deployment Manager.
3. From the left-hand toolbox, drag the **Salesforce Data** entry event onto the empty entry event circle in the journey.
4. Click the entry event, and select **Salesforce Data: Use this event to power a journey based on your Salesforce data**.
5. Define the Entry Source. For Select Object, select **ServiceAppointment**.
   a. For Select who to inject into the journey, select **ServiceAppointment: Account ID (PersonAccount)**. It appears in the Selected Object panel on the right.
   b. Click **Next.**
6. Select **Is Created** for Entry Criteria.
7. Select nothing for Filter Criteria, and then click **Next**.
8. Select fields for Entry Data.
   a. For Account ID (PersonAccount), select **Account ID**, **Contact ID**, and **Email**.
   b. For ServiceAppointment, select **Service Appointment ID**, **Scheduled Start**, **Scheduled End**, **Appointment Type**, **Description**, **Street**, **State**, and **Zip**.

9. Review the Summary fields.

| Who | Object | Action | Entry Data |
|---|---|---|---|
| Account ID (PersonAccount) | ServiceAppointment | Created; | ServiceAppointment:ParentRecord:AccountId<br>ServiceAppointment:ParentRecord:Account:PersonContactId<br>ServiceAppointment:Account:PersonEmail<br>ServiceAppointment:Id<br>ServiceAppointment:SchedStartTime<br>ServiceAppointment:SchedEndTime<br>ServiceAppointment:AppointmentType<br>ServiceAppointment:Description<br>ServiceAppointment:Street<br>ServiceAppointment:City<br>ServiceAppointment:State<br>ServiceAppointment:PostalCode |

10. Click **Done**.

**Step 4: Create the emails used in the journey**

This solution kit assumes there are three emails in this journey:

1. Appointment Confirmation
2. Appointment Reminder
3. Post-Appointment Survey

Your email creation process and brand guidelines are unique to your business. Use the Entry Event data fields outlined in Step 3 to include appointment details in the body of the email using AMPscript.

**Step 5: Configure the Wait Activities using ServiceAppointment object data**

The Scheduled Start and Scheduled End fields are Date-type fields and were included in the journey entry event. Use them to trigger the Appointment Reminder and Post-Appointment Survey emails.

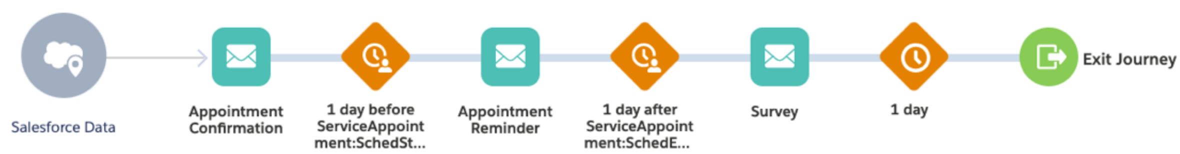
1. Click the first **Wait By Attribute** step in the journey.
2. Click **Select Attribute**.
3. Select **Journey Data**, then **Entry: Salesforce Scheduler Appointment**, and then **ServiceAppointment:SchedStartTime**.
4. Click **Summary**.
5. Change the Wait Interval to **1 day before ServiceAppointment:SchedStartTime**.
6. Click the second **Wait by Attribute** step in the journey.
7. Click **Select Attribute**.
8. Select **Journey Data**, then **Entry: Salesforce Scheduler Appointment**, and then **ServiceAppointment:SchedEndTime**.
9. Click **Summary**.
10. Keep 1 day after ServiceAppointment:SchedEndTime for the Wait Interval.

**Step 6: Configure the journey settings**

1. Click the gear icon, then **Journey Settings**.
2. Select **Re-entry only after exiting** for Contact Entry, or choose a different option based on your organization.
3. Under Default Email Address, keep ServiceAppointment:Account:PersonEmail for Use Email Attribute from Entry Source.
4. Click **Done**.

**Step 7: Activate the journey**

Activate the journey, and start scheduling appointments in Financial Services Cloud.




# More Customer Journey Examples

Create more journeys by following similar workflows using journey templates downloaded from GitHub.

These five example journeys include a brief description, a screenshot of the overall flow, and information about how to create the entry event.

Entry events use real-time Salesforce data.

- Contact ID or Person Account ID or Lead ID
- Email Address
- 'HasOptedOutOfEmail' field

**New Application**

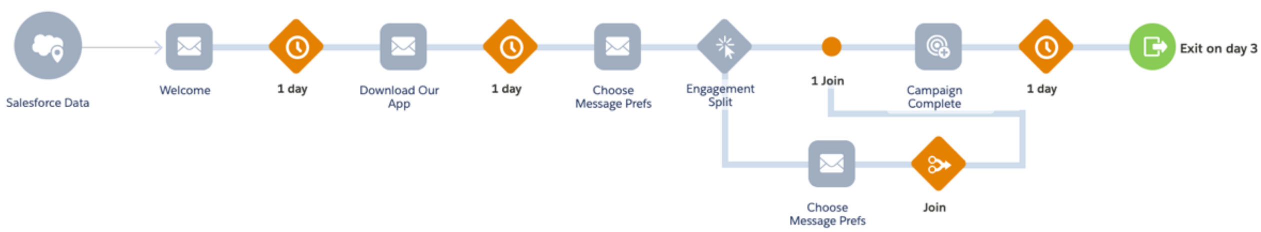
This journey guides a prospect or existing customer through an application process after new opportunity creation. Use the Journey Builder email tracking and engagement to update and follow up on tasks for the banker. It uses random splitting for people not engaged with the initial message to test various subject lines and creative content. This journey reinforces with more channels such as advertisements.

Include the following in the Opportunity event.

- Who: Primary_Contact__r ID (Contact)
- Object: Opportunity
- Action: Created
- Entry Data (minimum):
  - Opportunity:Id Opportunity:Primary_Contact__r:Id
  - Opportunity:Primary_Contact__r:Email
  - Opportunity:Primary_Contact__r:HasOptedOutOfEmail

### New Customer Onboarding

Guide new customers through an engaging onboarding process to encourage them to download the mobile app and set their communication preferences, such as channel and frequency. To trigger the journey, Salesforce adds customers to an Onboarding Campaign. Salesforce updates the Campaign Member status upon completion.

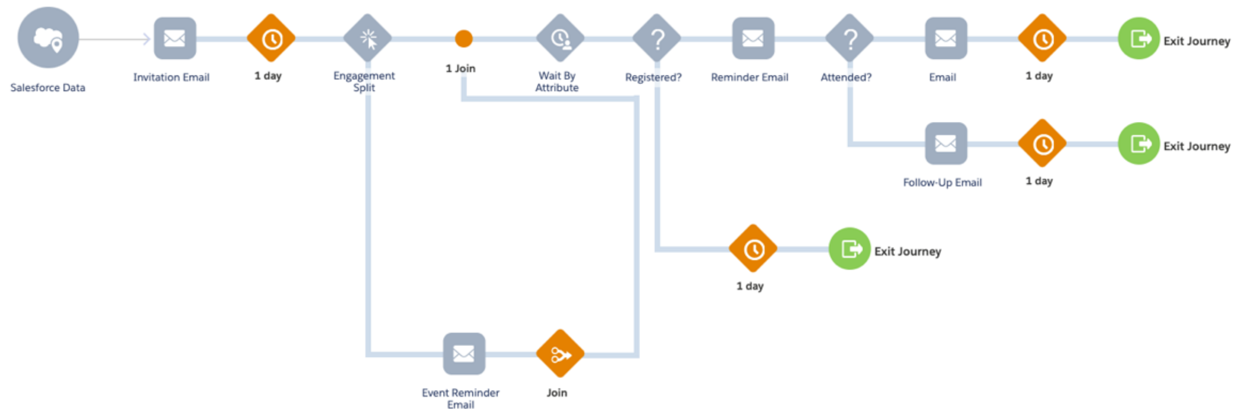



Include the following in the Salesforce Campaign event.

- Who: Contact ID/Lead ID (Contacts and Leads)
- Object CampaignMember
- ActionCTION: Created
- Criteria: *Your Company's Onboarding Campaign*
- Entry Data (minimum):
  - CampaignMember:Id
  - CampaignMember:Common:Id
  - CampaignMember:Common:Email
  - CampaignMember:Common:HasOptedOutOfEmail

### Event Invitation

This journey promotes an in-person or remote event, powered by an event campaign set up in Salesforce. It uses engagement splitting to maximize registration and then to remind and follow up with attendees and people who registered but didn't attend.




Include the following in the Salesforce Campaign event.

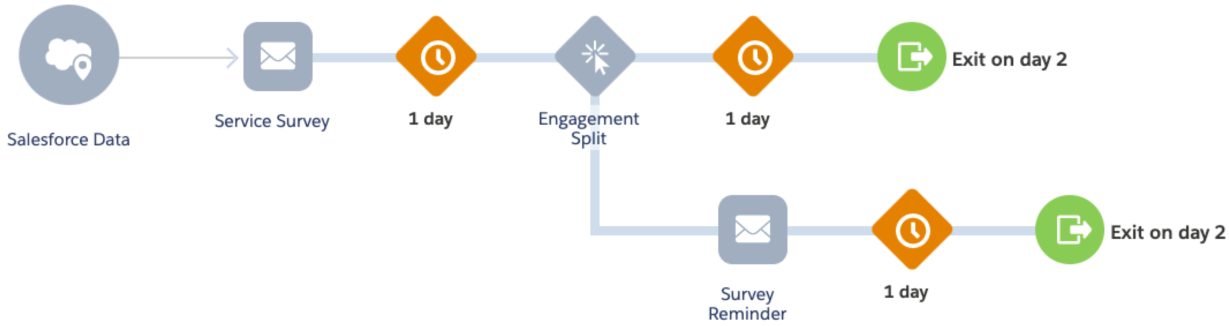
- Who: Contact ID/Lead ID (Contacts and Leads)
- Object: CampaignMember
- Action: Created;
- Criteria: *Your Company's Event Campaign*
- Entry Data (minimum):
  - CampaignMember:Campaign:Id
  - CampaignMember:Campaign:EndDate
  - CampaignMember:Campaign:StartDate
  - CampaignMember:Id; CampaignMember:Status
  - CampaignMember:Common:Id
  - CampaignMember:Common:Email
  - CampaignMember:Common:HasOptedOutOfEmail

Wait By Attribute Activity: This example assumes that sending invitations creates the Campaign Start Date. The date of the event itself is the End Date.

Configure the Salesforce Campaign Status to be Invited, Registered, and Attended. Use these statuses as the decision split before the reminder email and follow-up emails.

**Service Follow-up**

This simple journey triggers when a customer's case (or claim) closes. The goal is to gather feedback about the service experience and track the engagement to remind customers of the feedback request if they don't complete the survey.

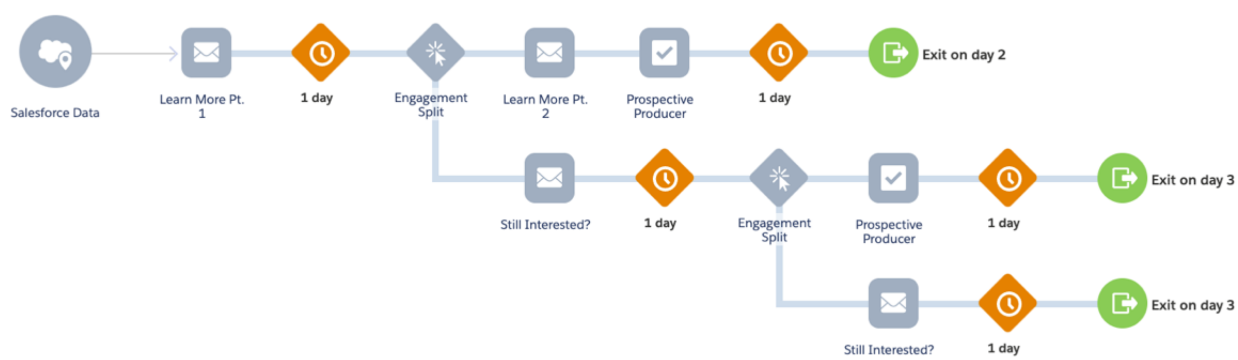



Include the following in the Salesforce Data > Case event.

- Who: Account ID (PersonAccount)
- Object: Case
- Action: Updated
- Criteria: Case:AccountId WASSET AND Case:Status EQUALS Closed
- Entry Data (minimum): Case:Account:Id; Case:Account:PersonContactId; Case:Id; Case:CaseNumber; Case:Subject

**Agent Recruiting Journey**

The purpose of this journey is to drive engagement with prospective agents while they explore offerings and benefits to their business and customers. This journey assumes that prospective agents are part of a Campaign in Salesforce before entering the journey.




Include the following in the Salesforce Campaign entry event.

- Who: Contact ID/Lead ID (Contacts and Leads)
- Object: CampaignMember
- Action: Created;
- Criteria: *Your Company's Event Campaign*
- Entry Data: CampaignMember:Id; CampaignMember:FirstName; CampaignMember:LastName; CampaignMember:Common:Id; CampaignMember:Common:Email; CampaignMember:Common:HasOptedOutOfEmail;

## Related Content

Review earlier steps in this solution.

- Workflow
- Design Considerations