



Developing A Complete Digital Customer Experience



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Thanks To Our Incredible Sponsors!

SERCANTE

salesforce

stensul

PFL

GRIDMATE

THE SPOT
by SERCANTE

FIONTA

Agenda

- How it used to be (the Problem)
- What we wanted (the Dream)
- What we did (the Solution)
- How it works (the Now)



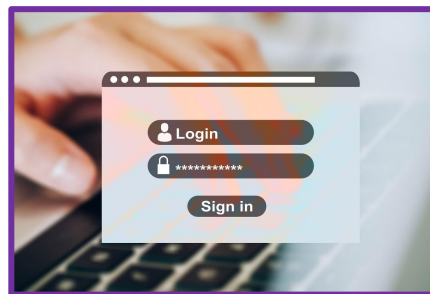
The Problem



Once upon a time



- External website to CRM
- Over-reliance on 3rd party agency
- Reports focused on traffic not ROI



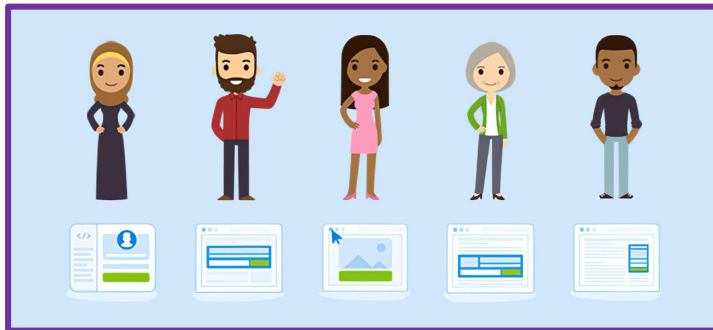
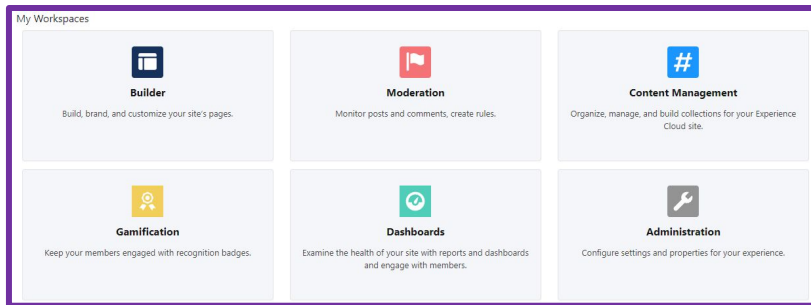
The Dream



We wish



- Autonomy
- Self-reliance
- Personalisation
- ROI reporting



The Solution



What we did

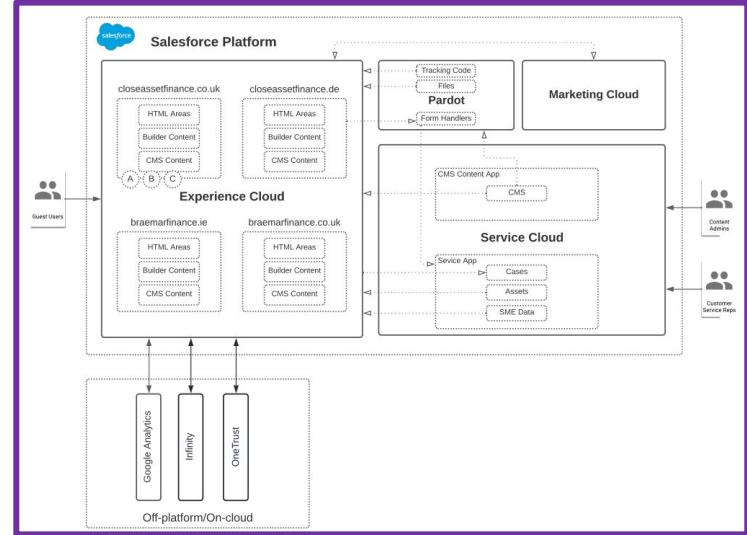


- Found a new partner
- Audit of current websites (x3)
- Proposal to build 49 components
- Sandbox environment
- Components and Key pages built
- Project only (no long-term reliance!)



Site Furniture

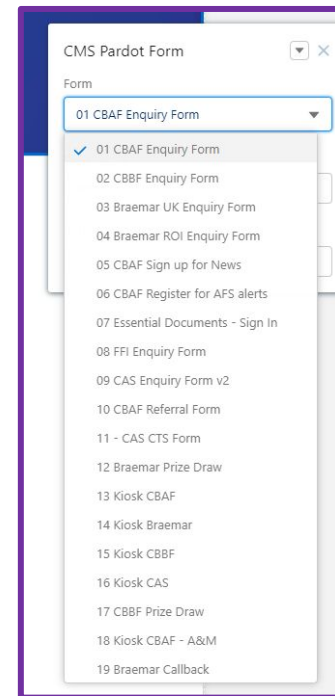
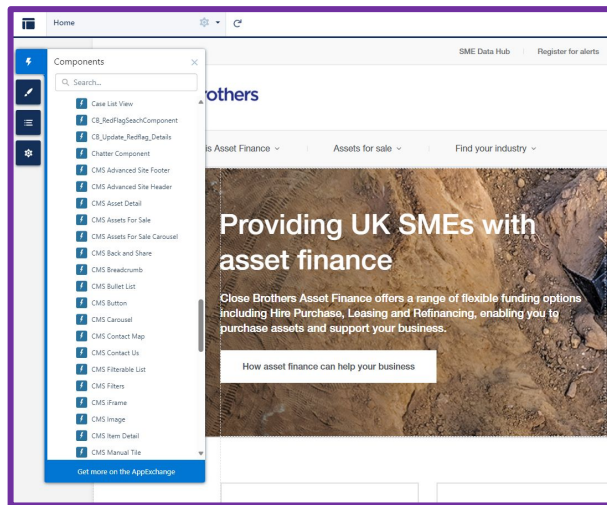
Component Name	Where Used	Notes	Estimated Effort
cookies [new]	Footer, all sites	New component, custom labels, ability to set cookie name for site.	Medium



New systems



- Experience Builder
- Pardot Forms Anywhere
- CMS Workspaces



CB Universal Content

Products

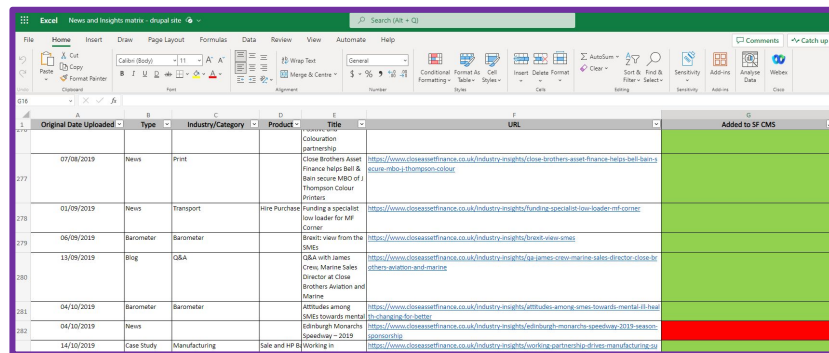
7 item(s)

	Title	Created by
<input type="checkbox"/>	CBAF and FFI Products (updated June 2023)	Nicole Northcroft
<input type="checkbox"/>	Broker products (updated June 2023)	Jon Dytor
<input type="checkbox"/>	Leasing Products	Jon Dytor
<input type="checkbox"/>	CAS Products	Nicole Northcroft
<input type="checkbox"/>	CBBF Products	Spencer Rixon
<input type="checkbox"/>	BF ROI Products	Nicole Northcroft
<input type="checkbox"/>	BF UK Products	Nicole Northcroft

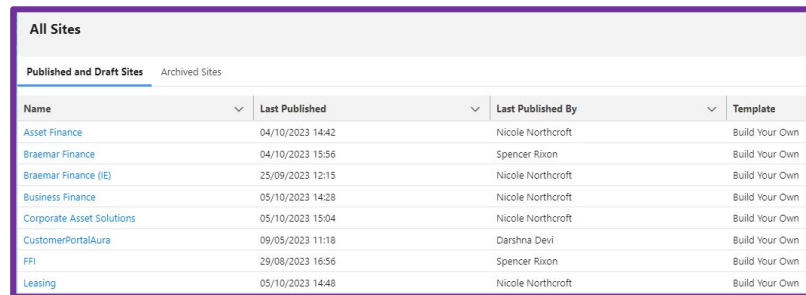


We can do it!

- We migrated over 1,000 pages of content
- We built 4 other websites inhouse
- ...and a Customer Portal
- WAF security implemented
- All sites went live June 2023



Original Date Uploaded	Type	Industry/Category	Product	Title	URL	Added to SF CMS
07/08/2019	News	Print	Collaboration partnership	Close Brothers Asset Finance helps Bell & Busch secure MBO of Thompson Custom Printers	https://www.closeassetfinance.co.uk/industry-insights/close-brothers-asset-finance-helps-bell-busch-secure-mbo-of-thompson-custom-printers/	
01/09/2019	News	Transport	Hire Purchase	Funding a specialist bus leader for MFL Corner	https://www.closeassetfinance.co.uk/industry-insights/funding-a-specialist-bus-leader-for-mfl-corner/	
06/09/2019	Barometer	Barometer		Braemar view from the skies	https://www.closeassetfinance.co.uk/industry-insights/braemar-view-from-the-skies/	
13/09/2019	Blog	Q&A		Q&A with James Davis, Marine Sales Director at Close Brothers Aviation and Marine	https://www.closeassetfinance.co.uk/industry-insights/q-a-james-davis-marine-sales-director-close-brothers-aviation-and-marine/	
04/10/2019	Barometer	Barometer		Attitudes among SMEs towards merger	https://www.closeassetfinance.co.uk/industry-insights/attitudes-among-smes-towards-merger-04-10-2019/	
04/10/2019	News			Edinburgh Motorworks Speedway - 2019 sponsorship	https://www.closeassetfinance.co.uk/industry-insights/edinburgh-motorworks-speedway-2019-season-sponsorship/	
14/10/2019	Case Study	Manufacturing	Sale and lease back financing		https://www.closeassetfinance.co.uk/industry-insights/working-partnership-in-sell-manufacturing-01-14-2019/	



All Sites			
Published and Draft Sites		Archived Sites	
Name	Last Published	Last Published By	Template
Asset Finance	04/10/2023 14:42	Nicole Northcroft	Build Your Own
Braemar Finance	04/10/2023 15:56	Spencer Rixon	Build Your Own
Braemar Finance (IE)	25/09/2023 12:15	Nicole Northcroft	Build Your Own
Business Finance	05/10/2023 14:28	Nicole Northcroft	Build Your Own
Corporate Asset Solutions	05/10/2023 15:04	Nicole Northcroft	Build Your Own
CustomerPortalAura	09/05/2023 11:18	Darshna Devi	Build Your Own
FFI	29/08/2023 16:56	Spencer Rixon	Build Your Own
Leasing	05/10/2023 14:48	Nicole Northcroft	Build Your Own



The Now



EXPERIENCE CLOUD

- Digital channels
- Websites
- Customer Portal

ACCOUNT ENGAGEMENT

- Enquiry and Kiosk forms
- Emails and Surveys
- Lead Queue assignment rules

SALES CLOUD

- Campaigns
- Lead Queues
- Survey responses
- UTM / SOI

ANALYTICS STUDIO

- Leads and Opportunities
- Engagement reports



EXPERIENCE CLOUD



Digital channels

- Main channels are Direct / Organic / Social media / PPC / Adverts
- All traffic captures UTMs / SOI for converted Leads

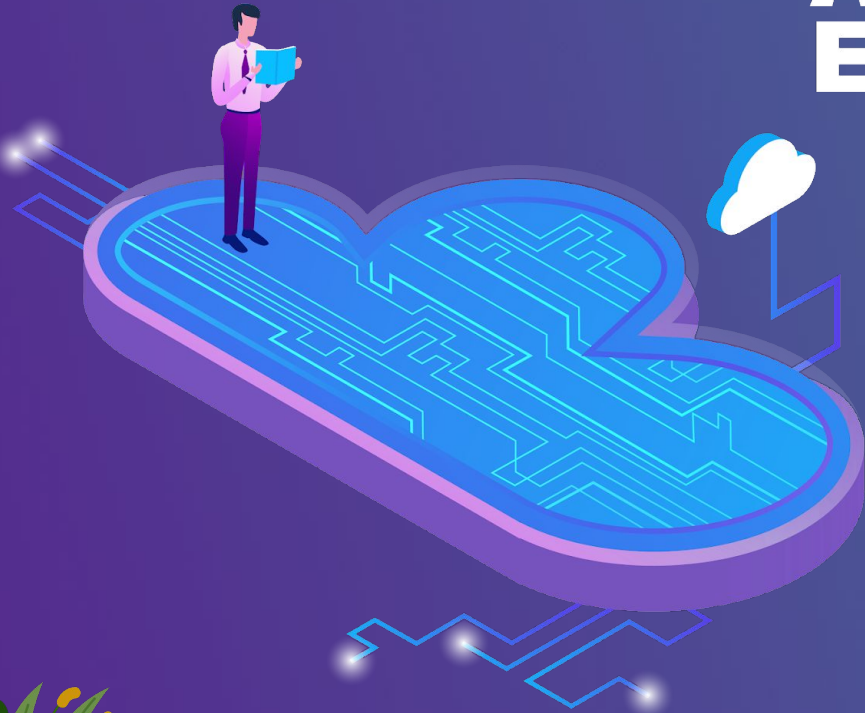
Websites

- Headless CMS: Content / Imagery is managed in one repository and can be used across multiple sites / portals at same time
- Full creative control of websites for Digital team
- Potential to personalise customer experience due to connection to Sales Cloud
- Currently x7 websites (CBAF, Braemar UK, Braemar ROI, CAS, FFI, Leasing and CBBF) – can have up to 100

Customer Portal

- Displays customer data direct from Sales Cloud
- Customer can self-service such as settlement requests and new finance requests

ACCOUNT ENGAGEMENT



Enquiry and Kiosk forms

- All forms capture UTMs
- Kiosk forms assigns Leads to relevant Event for clear ROI
- Enquiry forms sends Leads to queues

Emails and Surveys

- Automated campaigns for key milestones such as At Risk customers
- Surveys: Welcome / In life / End of life surveys (GetFeed back) – automatically sent to customers and their responses sent to Sales Cloud
- Email campaigns for prospects, active, and dormant customers split by industry / business

Lead Queue assignment rules

- Automated Lead assignment via Industry / Postcode / Asset for sale for all web enquiries

SALES CLOUD



Campaigns

- Campaign influence for Events and Emails (Opportunities created within 90 days of attendance / engagement)

Lead Queues

- Automated Lead assignment via Industry / Postcode / Asset for sale - sends all website Leads to relevant queue

Survey responses

- Welcome / In life / End of life surveys (GetFeedback) – responses sent to Sales Cloud and Contact Owner notified

UTM / SOI

- All marketing generated Leads include UTM and SOI which is kept on the record when converted to Contacts and Opportunities



ANALYTICS STUDIO

Leads and Opportunities

- Report on ROI all Leads / Opportunities generated via;
 - UTMs
 - Campaign influence
 - SOI
- Includes campaign spend to see real time ROI

Engagement reports

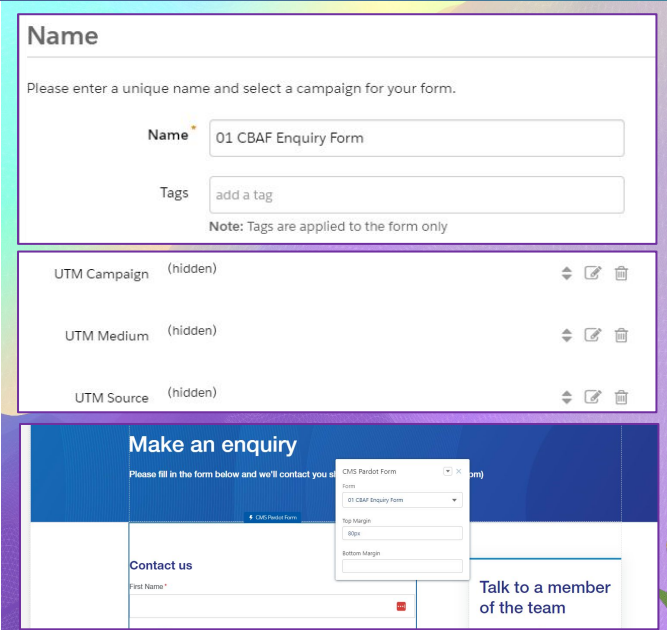
- Email stats (Open rates, Click Thru Rates, etc)
- Phone stats (Marketing calls, missed calls)
- Web traffic stats (sessions, users, engagement, etc)
- Social media stats (followers and engagement)

Examples

We build a new form in MCAE

We add in hidden fields to capture UTMs

We add this form to a new webpage



Name

Please enter a unique name and select a campaign for your form.

Name *

Tags

Note: Tags are applied to the form only

UTM Campaign (hidden) ↕ 📄 🗑️

UTM Medium (hidden) ↕ 📄 🗑️

UTM Source (hidden) ↕ 📄 🗑️

Make an enquiry

Please fill in the form below and we'll contact you shortly.

Contact us

First Name *

Talk to a member of the team

Form Configuration Panel:

OMS Random Form

Name

01 CBAF Enquiry Form

Top Margin

Width

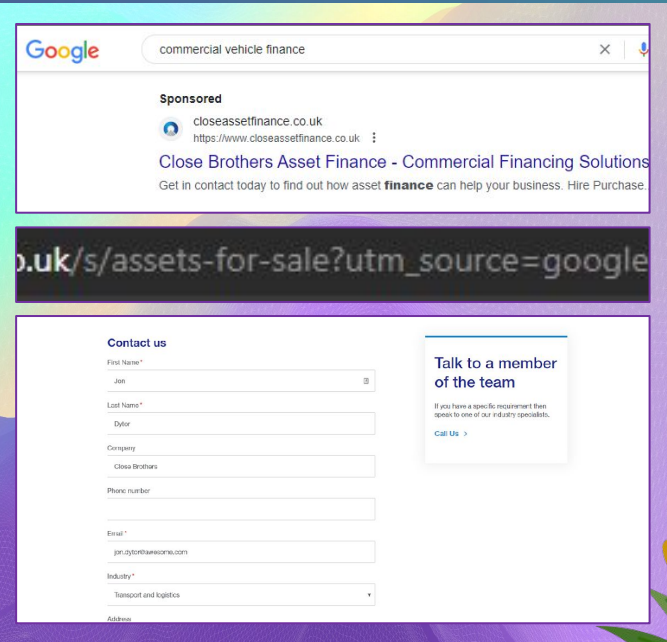
Bottom Margin

Examples

Customer visits a Search Engine and clicks on one of our PPC adverts

The page they land on has UTMs in the URL

They fill in the enquiry form that has hidden fields that captures the UTMs





The screenshot shows a Google search for "commercial vehicle finance". The top result is a sponsored ad for "Close Brothers Asset Finance - Commercial Financing Solutions". Below the ad, a portion of the URL is visible: "o.uk/s/assets-for-sale?utm_source=google". The bottom part of the screenshot shows a "Contact us" form with the following fields: First Name* (filled with "Jan"), Last Name* (filled with "Dyler"), Company (filled with "Close Brothers"), Phone number, Email* (filled with "jan.dyler@closebrothers.com"), Industry* (filled with "Transport and logistics"), and Address. To the right of the form is a call-to-action box that says "Talk to a member of the team" and "If you have a specific requirement then speak to one of our industry specialists." with a "Call Us >" link.

Examples

The form creates a Prospect in MCAE

The fields for UTMs are populated

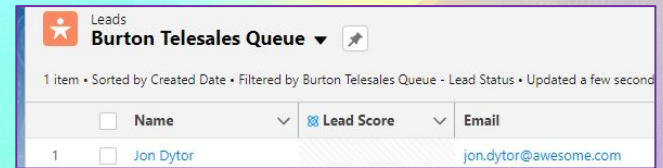
Using the Postcode and Industry fields, logic assigns the Prospect to the correct Lead Queue

Name	Jon Dytor
Email	jon.dytor@awesome.com 
Company	Close Brothers
Account Name	No account
Source Campaign	PPC (CBAF Google)
UTM Campaign	Assets For Sale
UTM Medium	PPC
UTM Source	Google
Assigned User	Burton Telesales Queue
Notes	
Recent Interaction	 Online now

Examples

Lead appears in Lead queue and is qualified by sales team

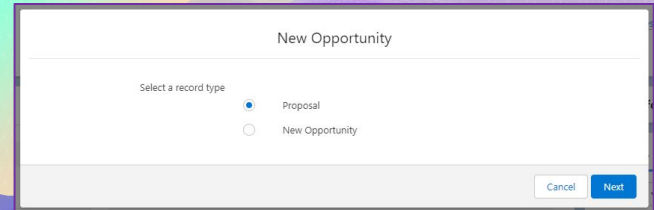
Lead is converted into an Opportunity (which is Closed Won)



Leads
Burton Telesales Queue

1 item • Sorted by Created Date • Filtered by Burton Telesales Queue - Lead Status • Updated a few seconds ago

<input type="checkbox"/>	Name	Lead Score	Email
1	<input type="checkbox"/> Jon Dytor		jon.dytor@awesome.com



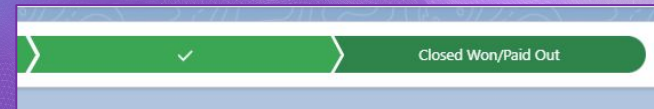
New Opportunity

Select a record type

Proposal

New Opportunity

Cancel Next

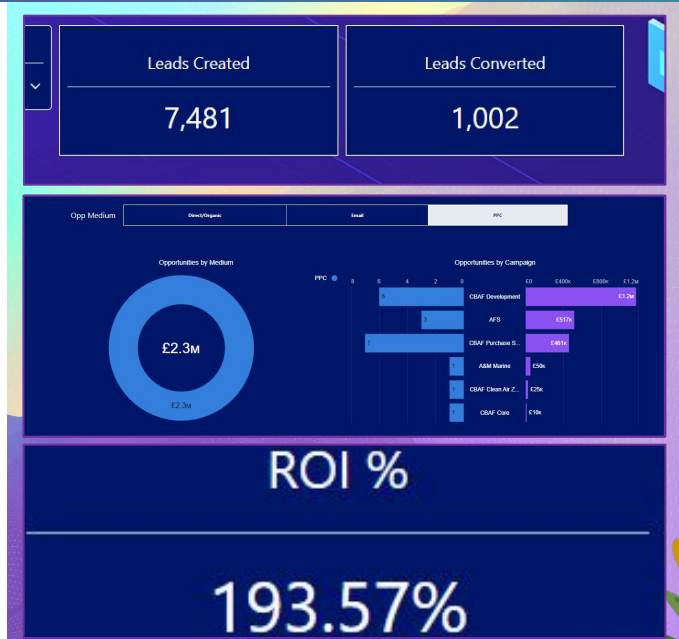


Examples

In Analytics Studio we can see the number of Leads created and converted

And the number of Opportunities, split by UTM (Source, Medium and Campaign)

As we know the cost of the campaign, we can see ROI in realtime



Did we get what we wanted?

- Autonomy



- Self-reliance



- Personalisation



- ROI reporting



Thank You!

