MARDREAMIN'

Developing A Complete Digital Customer Experience

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SERCANTE

salesforce

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GRIDMATE

THE SPOT by SERCANTE

FIONTA

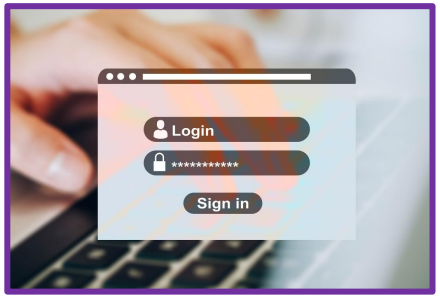
Agenda

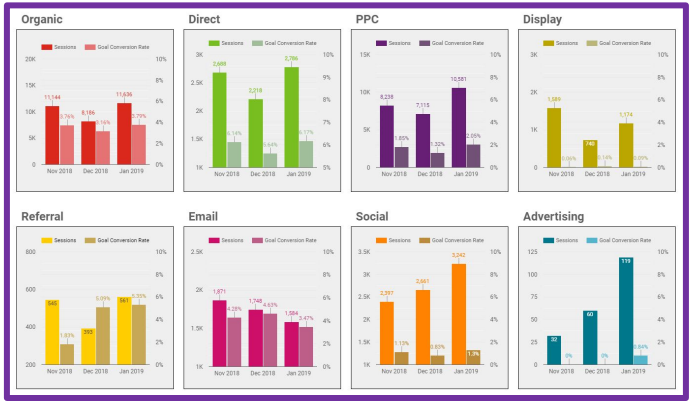
- How it used to be (the Problem)
- What we wanted (the Dream)
- What we did (the Solution)
- How it works (the Now)

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

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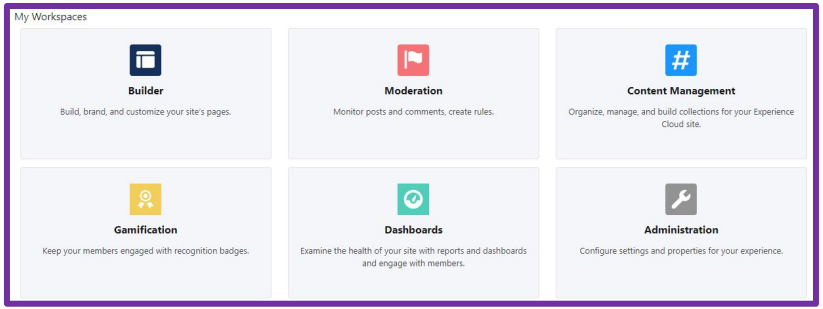
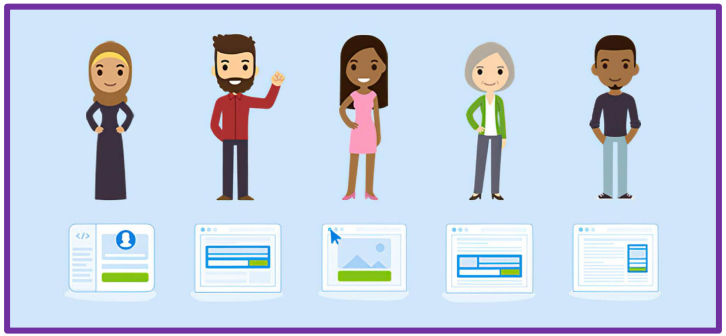
- Autonomy
- Self-reliance
- Personalisation
- ROI reporting

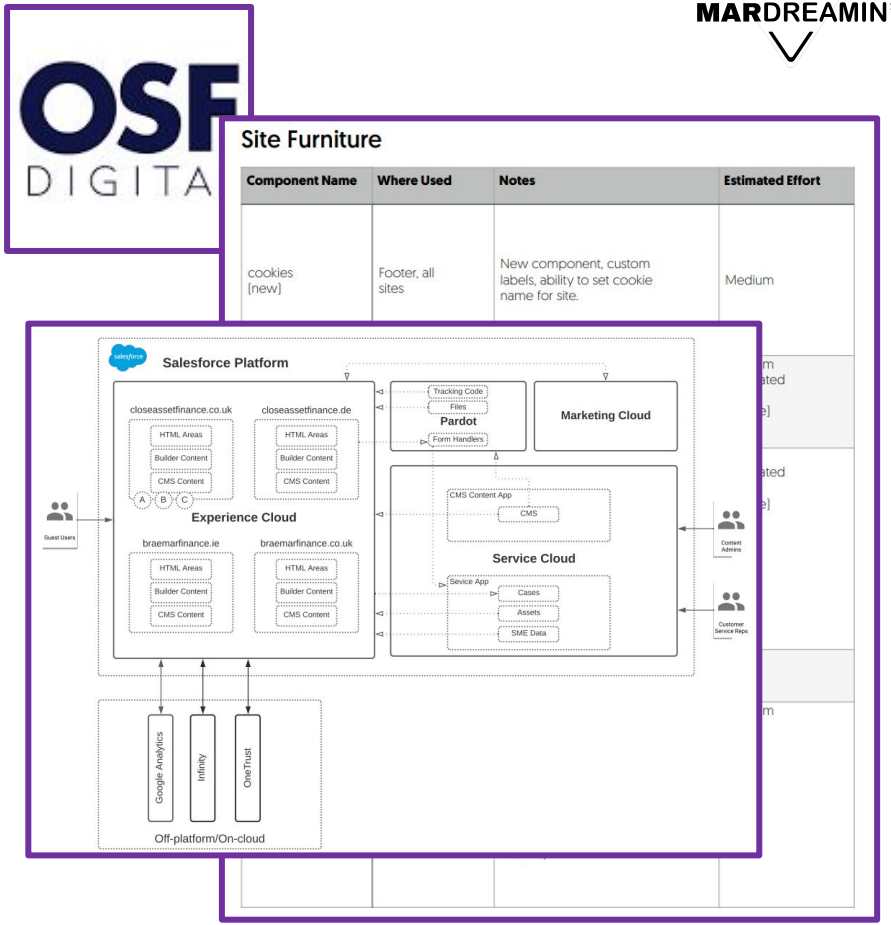




The Solution

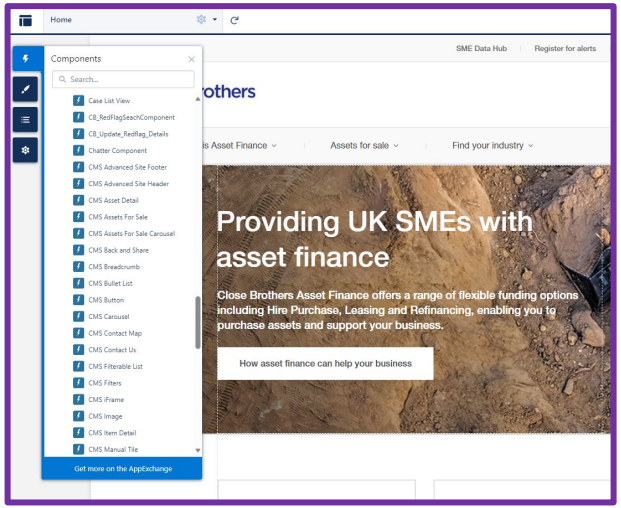
What we did

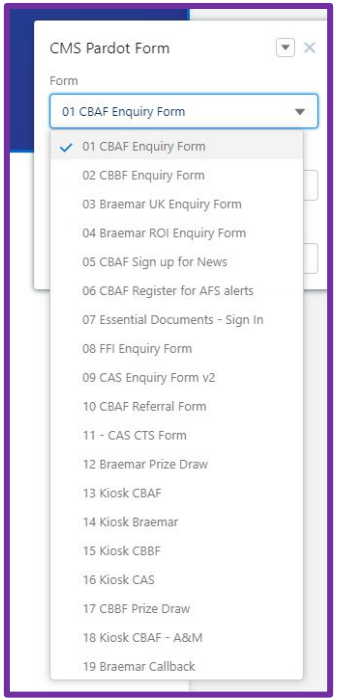
- Found a new partner
- Audit of current websites (x3)
- Proposal to build 49 components
- Sandbox environment
- Components and Key pages built
- Project only (no long-term reliance!)

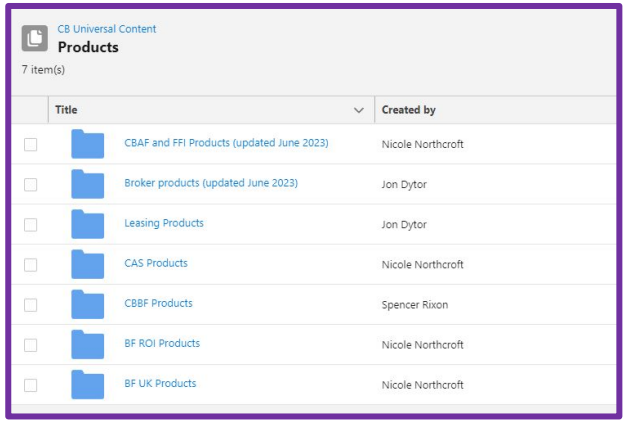


New systems

- Experience Builder
- Pardot Forms Anywhere
- CMS Workspaces

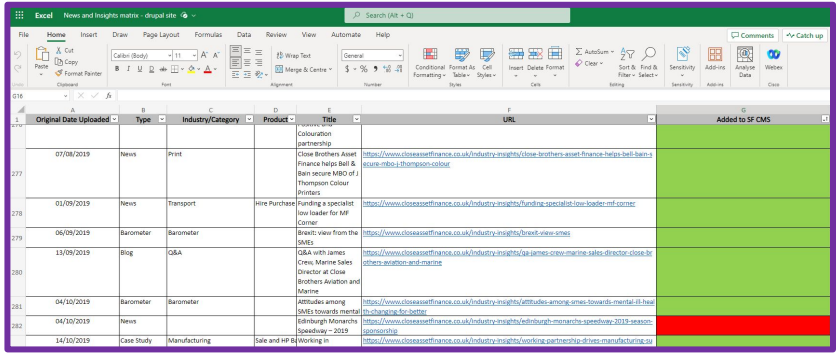




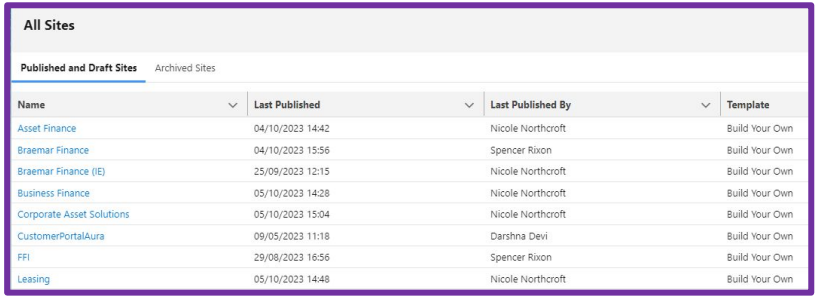


We can do it!

- 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
				Colouration partnership		
07/08/2019	News	Print		Close Brothers Asset Finance helps Bell & Bain secure MBO of J Thompson Colour Printers	https://www.closeassetfinance.co.uk/industry-insights/close-brothers-asset-finance-helps-bell-bain-secure-mbo-j-thompson-colour	
01/09/2019	News	Transport	Hire Purchase	Funding a specialist low loader for MF Corner	https://www.closeassetfinance.co.uk/industry-insights/funding-specialist-low-loader-mf-corner	
06/09/2019	Barometer	Barometer		Brexit: view from the SMEs	https://www.closeassetfinance.co.uk/industry-insights/brexit-view-smes	
13/09/2019	Blog	Q&A		Q&A with James Crew, Marine Sales Director at Close Brothers Aviation and Marine	https://www.closeassetfinance.co.uk/industry-insights/qa-james-crew-marine-sales-director-close-brothers-aviation-and-marine	
04/10/2019	Barometer	Barometer		Attitudes among SMEs towards mental	https://www.closeassetfinance.co.uk/industry-insights/attitudes-among-smes-towards-mental-ill-health-changing-for-better	
04/10/2019	News			Edinburgh Monarchs Speedway – 2019	https://www.closeassetfinance.co.uk/industry-insights/edinburgh-monarchs-speedway-2019-season-sponsorship	
14/10/2019	Case Study	Manufacturing	Sale and HP B	Working in	https://www.closeassetfinance.co.uk/industry-insights/working-partnership-drives-manufacturing-su	



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

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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

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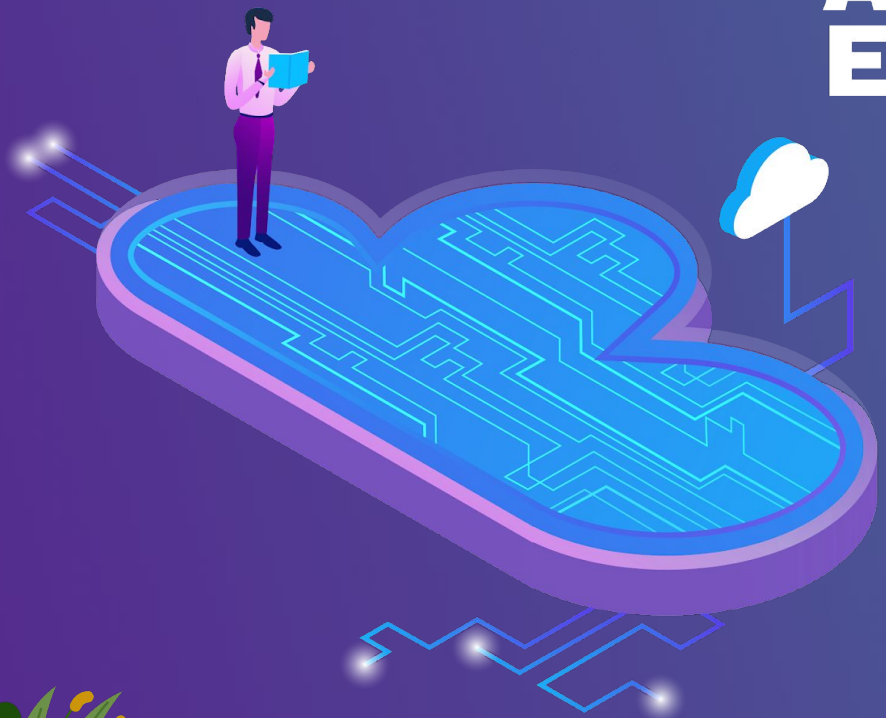
ACCOUNT ENGAGEMENT



- **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

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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

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ANALYTICS STUDIO

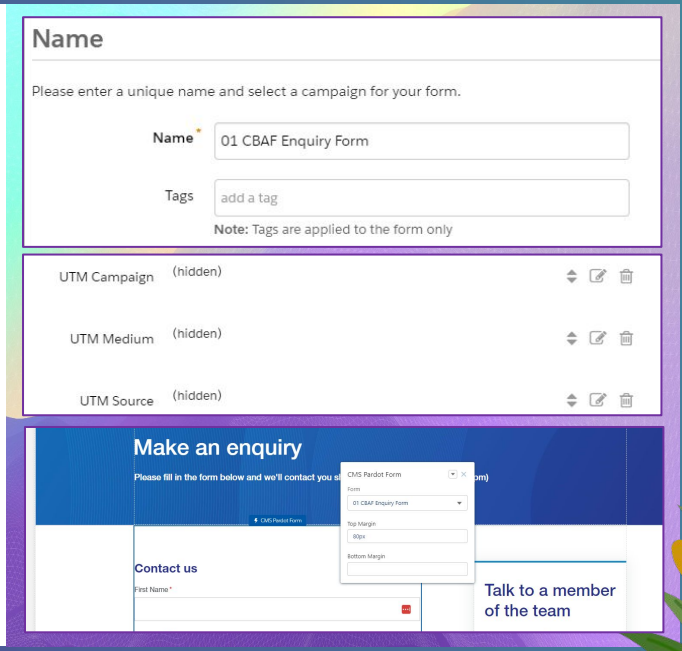
- **Leads and Opportunities**
  - Report on ROI all Leads / Opportunities generated via;
    - UTMs
    - Campaign influence
    - SOI
  - Includes campaign spend to see real time ROI
- **Engagement reports**
  - Email stats (Open rates, Click Thru Rates, etc)
  - Phone stats (Marketing calls, missed 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

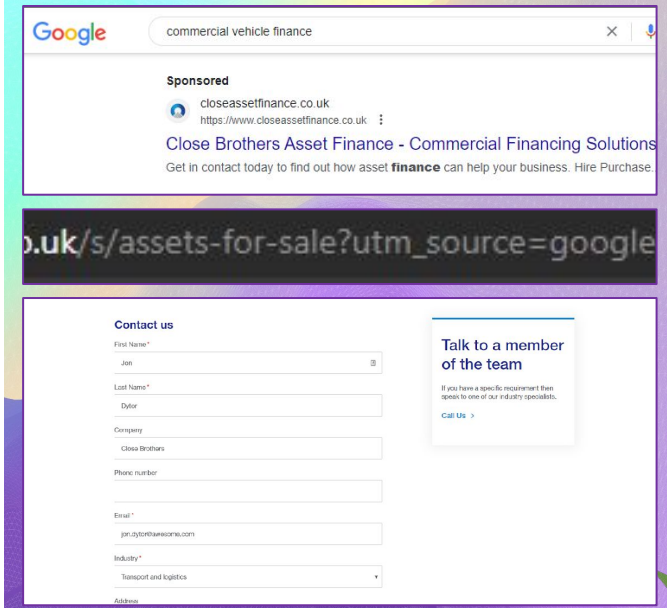


Examples

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

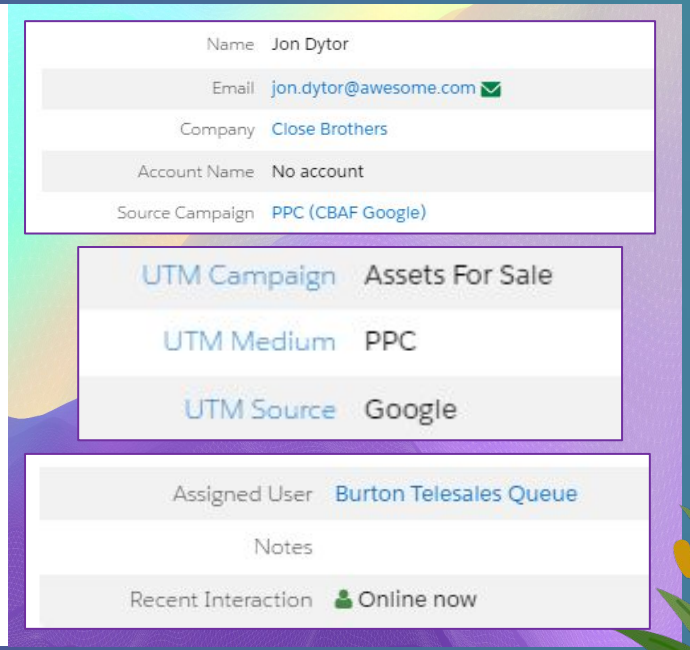


Examples

The form creates a Prospect in MCAE

The fields for UTMs are populated

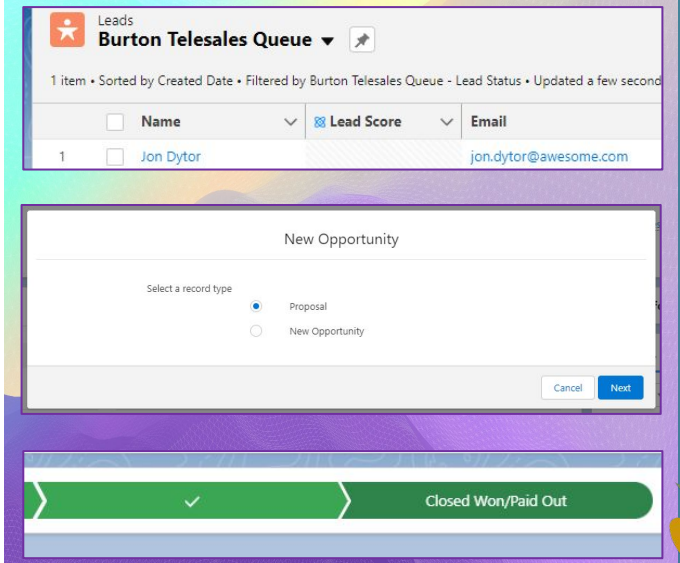
Using the Postcode and Industry fields, logic assigns the Prospect to the correct Lead Queue



Examples

Lead appears in Lead queue and is qualified by sales team

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

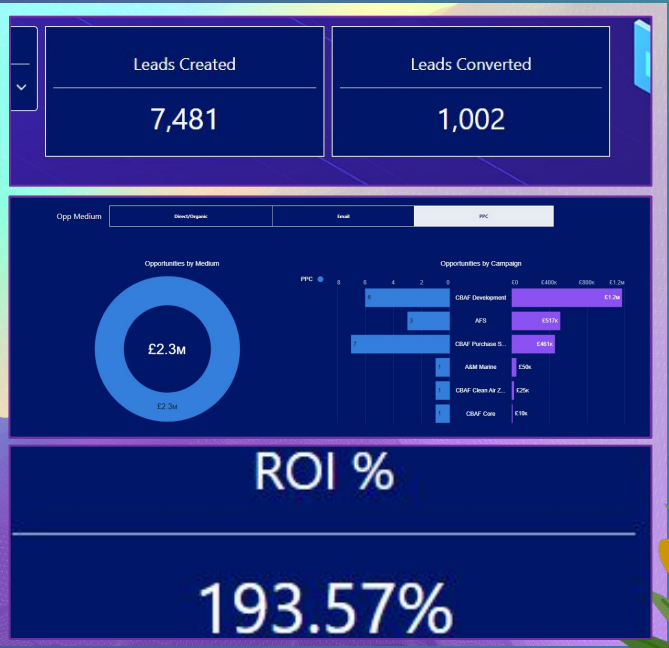


Examples

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!