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Creating Feedback Loops Throughout the Customer Journey

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Close Brothers, Marketing Automation Specialist

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Creating Feedback Loops Throughout the Customer Journey

Agenda

- Problem vs goal
- Automation rules and email templates
- Creating integrated feedback surveys
- Syncing back to Salesforce
- Complete the loop!

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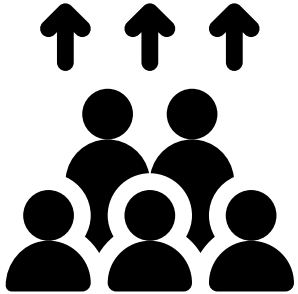
Where we were

So much work
(for multiple brands!)

- Once a year
- Lists
- Upload
- Distribute
- Spreadsheets



Close Brothers Asset Finance

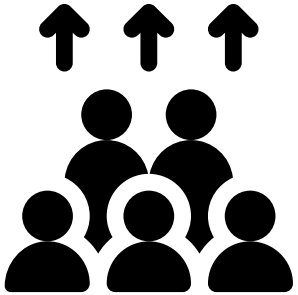
BRAEMAR FINANCE
Part of Close Brothers Group

Close Brothers Leasing

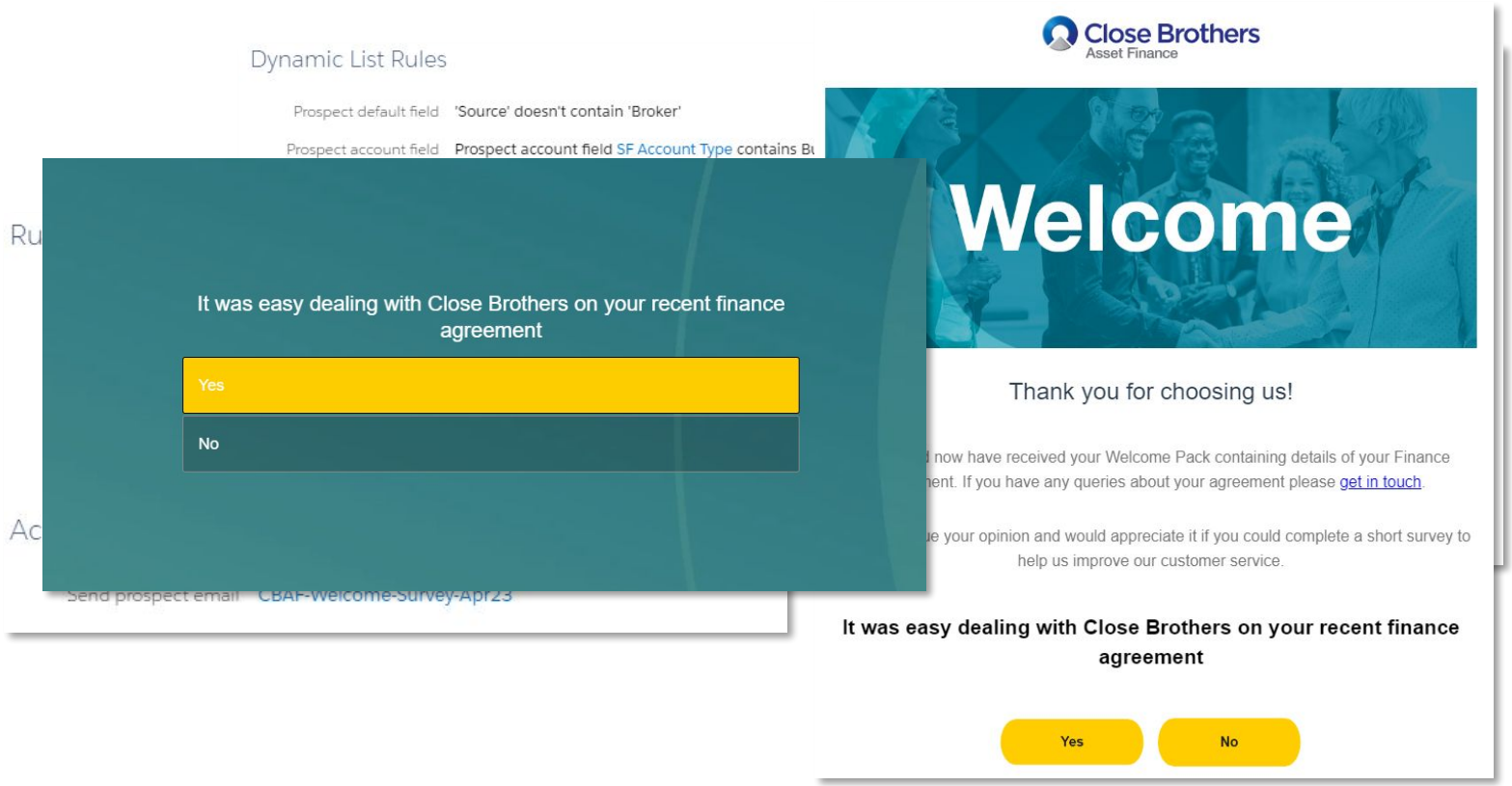
Where we wanted to be

Automate the work!

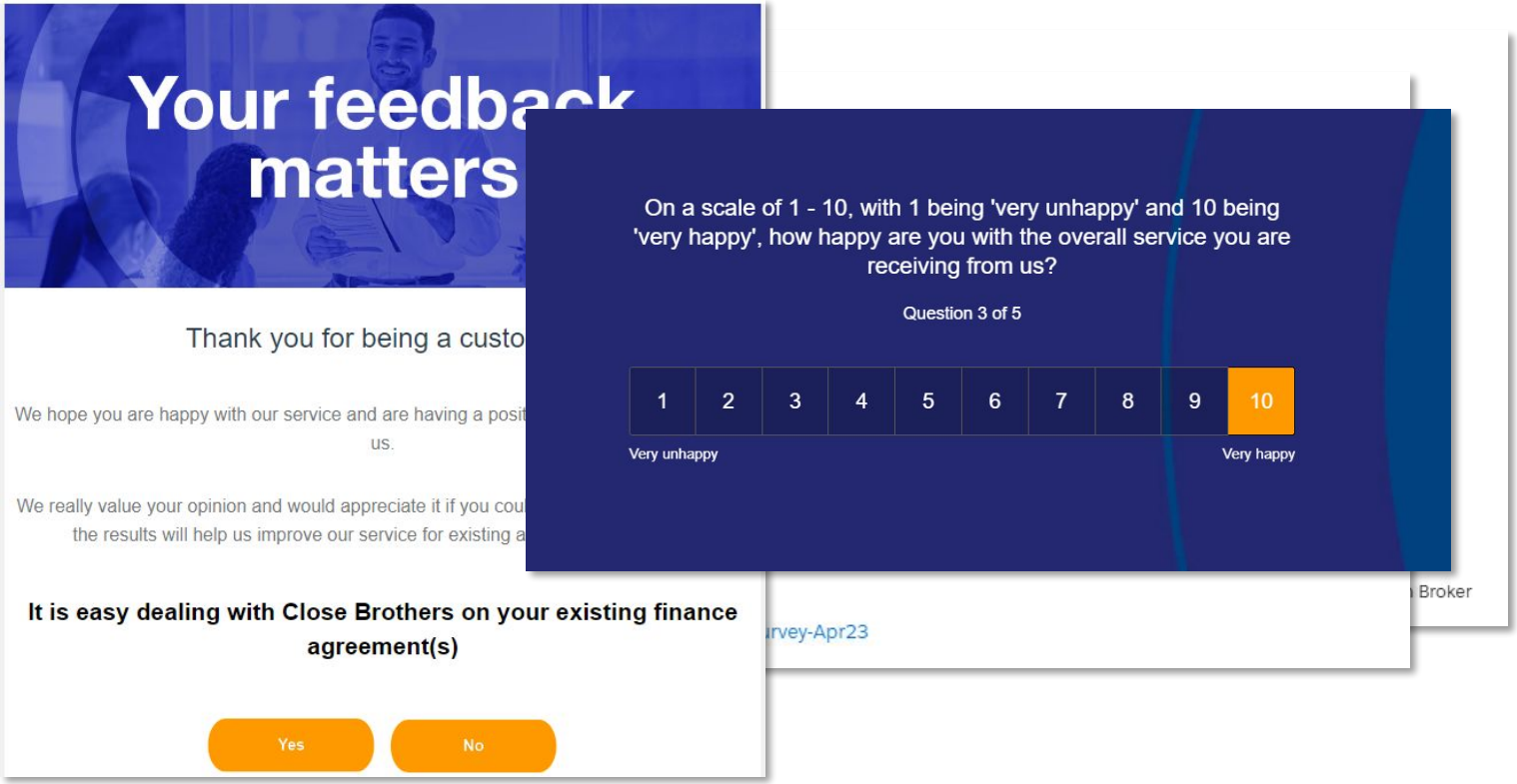
- Ongoing
- Dynamic lists
- Timed surveys
- Salesforce integration
- Dashboards



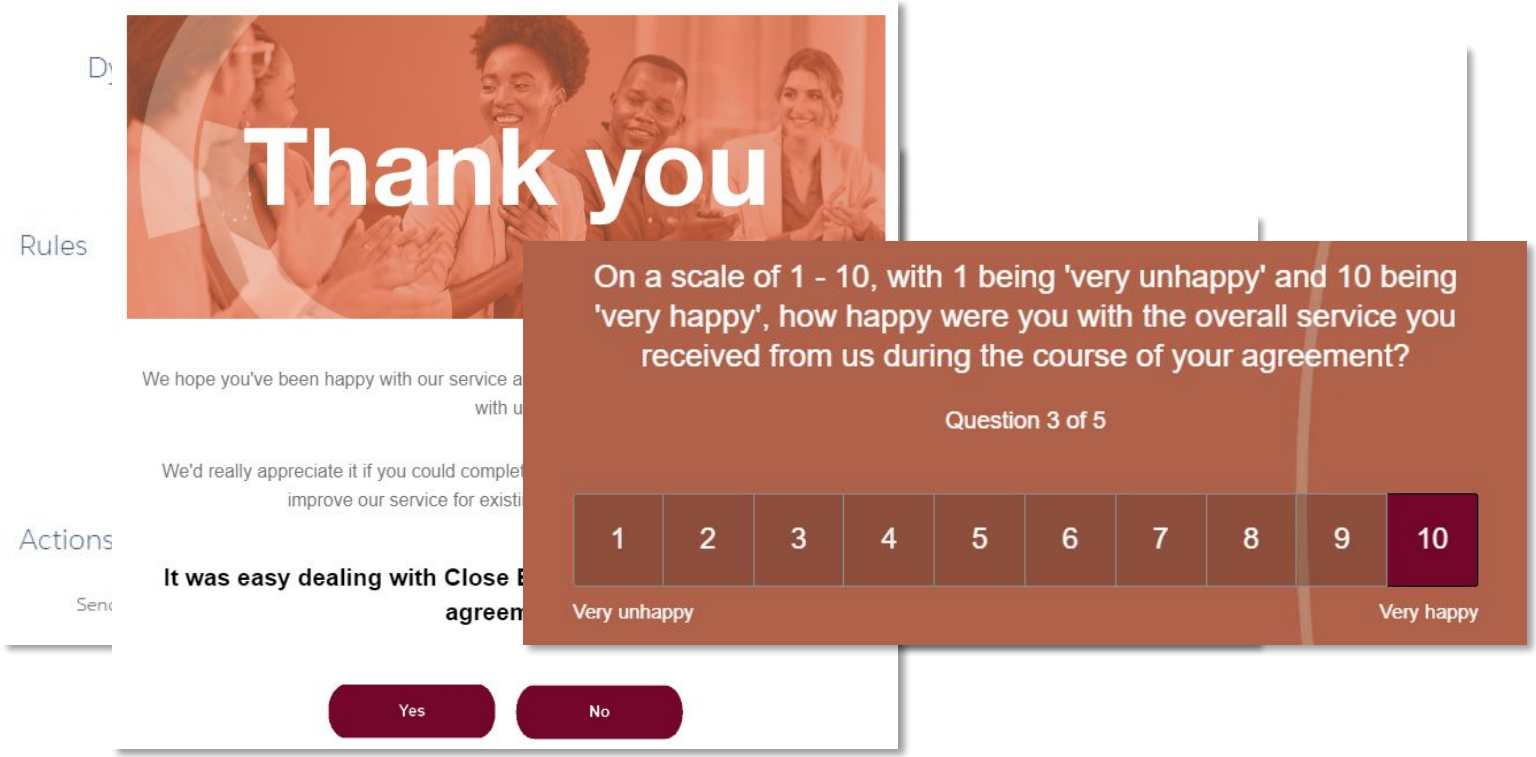
Automation Rules - Welcome



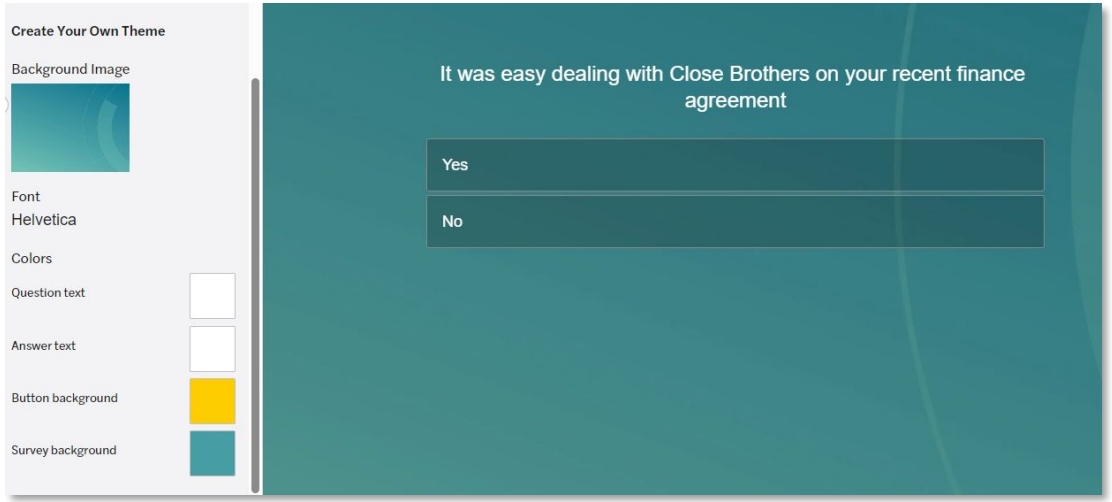
Automation Rules – In-Life

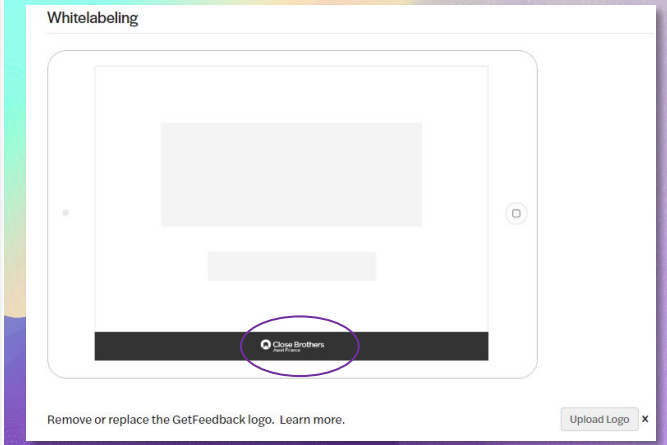


Automation Rules – End of Life



Creating Integrated GetFeedback Surveys





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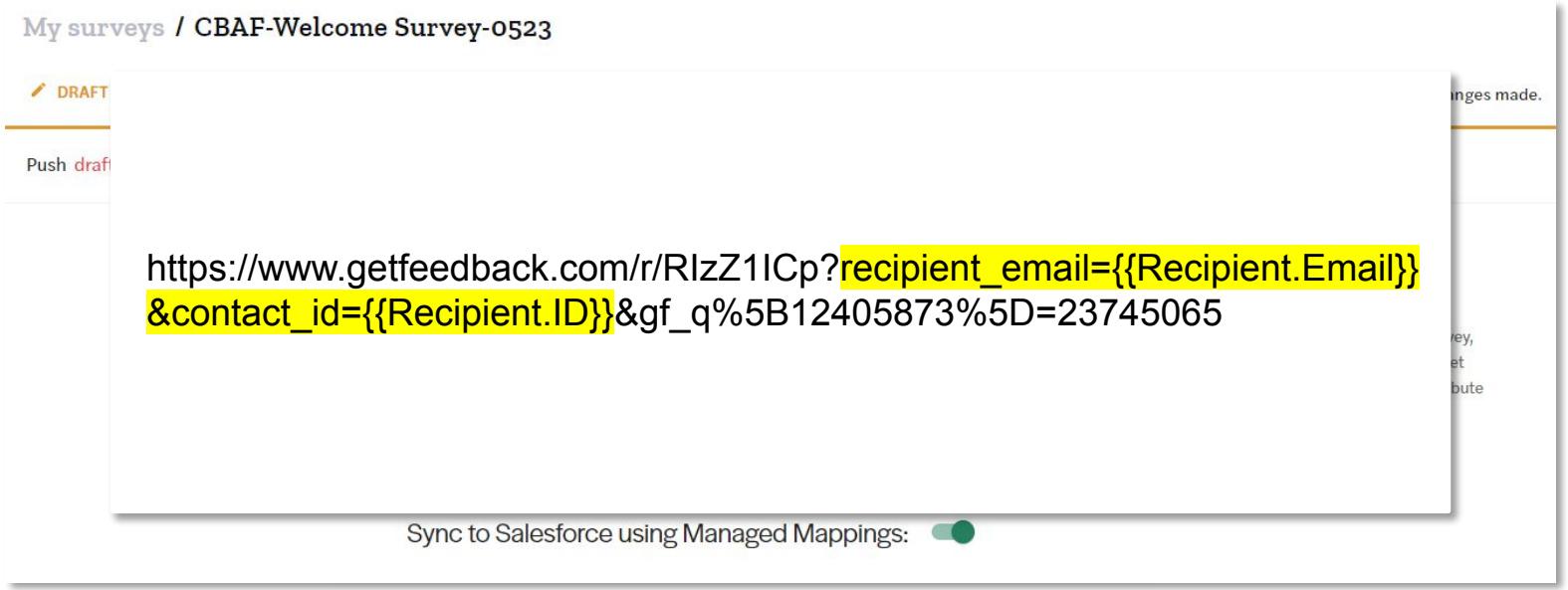
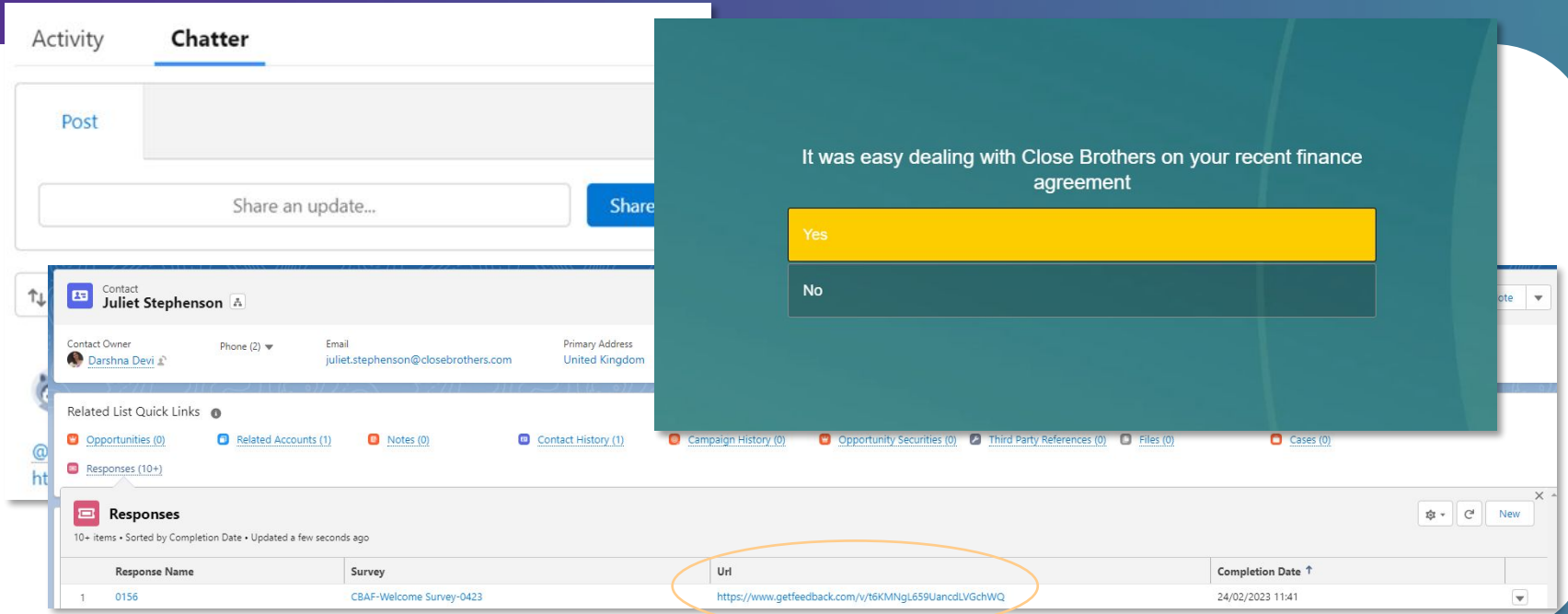
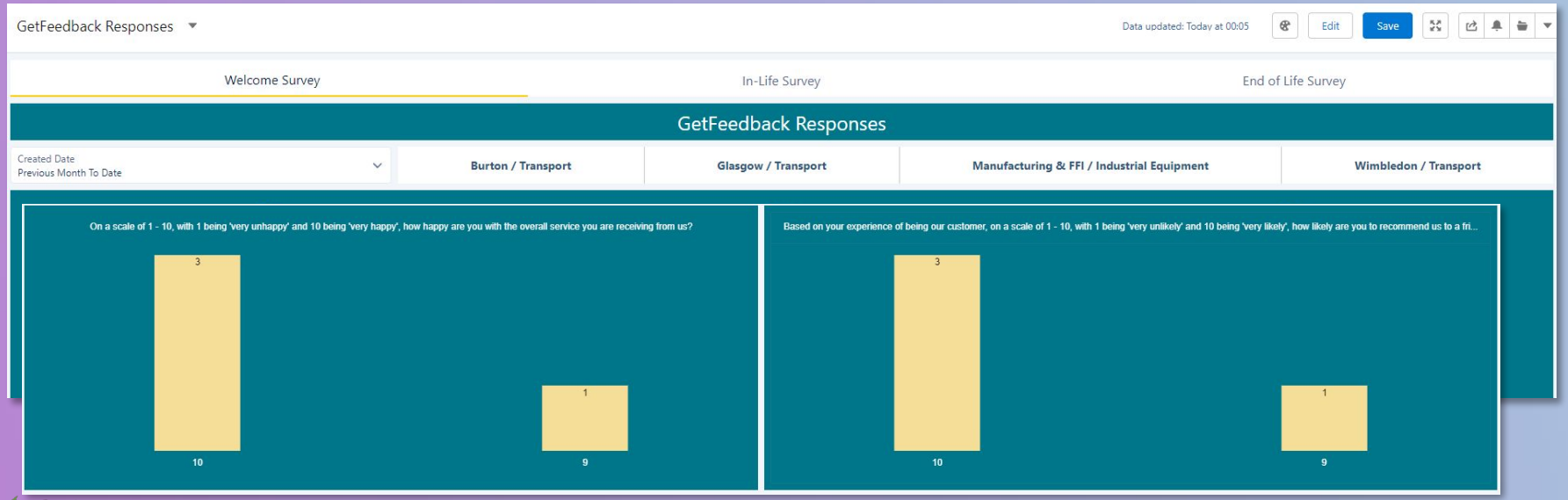


Survey Response Sync in Salesforce



Reporting with Analytics Studio



Where we ~~wanted to be~~ are

Automated the work!

- Ongoing
- Dynamic lists
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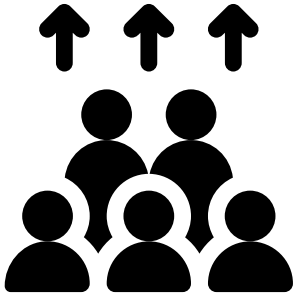

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Our Feedback Loop

Thank You!

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