



The Art Of Listening: Crafting Impactful Customer Journeys In Marketing Cloud



Rodrigo Santander
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Rodrigo Santander
Detective



Ro_Santander



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R PROFESSOR RO

and the
ART OF LISTENING



**Crafting Impactful Customer
Journeys In Marketing Cloud**



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THE SPOT
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About me



Rodrigo Santander
Solution Architect

- SF Marketing Champion
- Email geek, Friends Of Email
- Love drawing and playing ukulele
- **8x** Salesforce certified



Ro_Santander

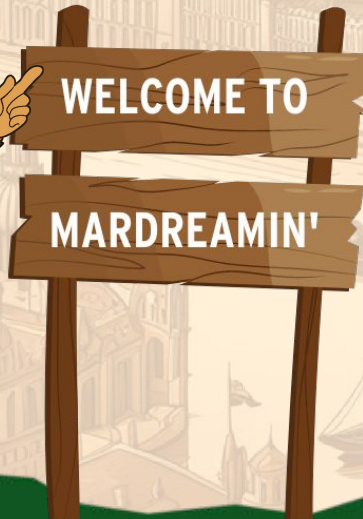


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Agenda



- **Solution Diagram**
- **Solution Architect Skill Set**
- **Discovery Phase**
 - Goal
 - Audience
 - Service/Product
 - Moment
 - Success Metrics
 - Tech Stack

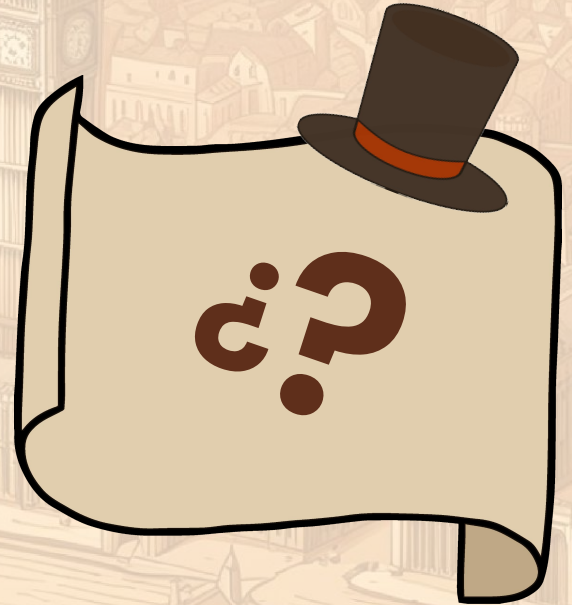


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and the ART OF LISTENING

A new case is open! Your job as a seasoned **Solution Architect** is to craft the intricate pathways of your Customer Journey.

To crack this challenge, you'll need the guiding lantern of **SFMC** and strategic knowledge to light your way.



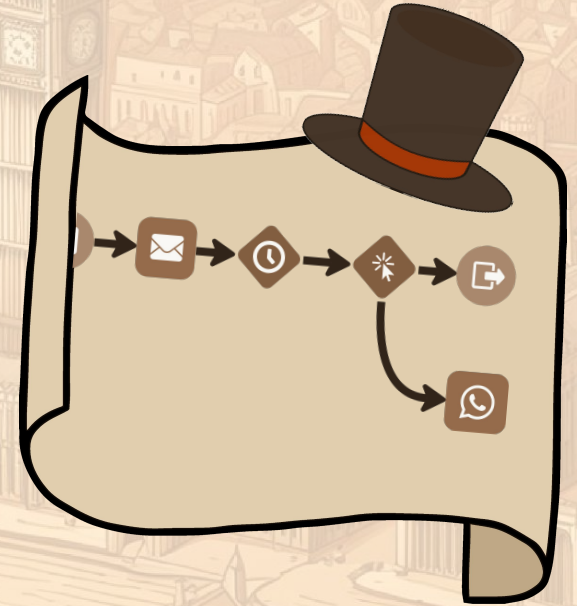
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Your mission is to listen 

- Attune your senses,
- Interview your stakeholders,
- Learn from your clients,

In return you'll find a potential solution.



Who's this really for?



Prof. Ro

- **Solution architects**
- **Partners**
- **Team leaders**
- **Consultants**
- **marketing teams**
- **You**

Any detective who works with clients
on the SFMC ecosystem *(or any tool really)*



Solution Diagram



Solution Architect
Skill Set

+Stakeholders

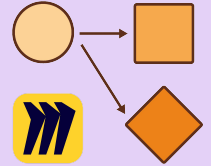


1 Discovery



2 Analysis

+Stakeholders



3 Workshop

Design Process

Solution Architect Skill Set



TECHNICAL SKILLS

SFMC Knowledge, how everything works

Hands-on experience with the platform and projects



CONSULTING SKILLS

Marketing knowledge (*terminology, digital strategy, lifecycle, funnel, customer journey, buyer persona*)



UNIQUE BACKGROUND

What special knowledge do you bring into the mix?

I was a Creative director, (UX, UI & branding), it helps me use storytelling and creativity to deliver a holistic experience together with my new technical skills



WORK WITH A TEAM

No detective agency is complete without a companion!
(Developer + Admin + Project Manager)



Discovery

Session's objective:

Listen to the client, understand their needs, **ask the right questions**, don't leave without a clear understanding of the problem to be solved.



 Time: 1 hour



What should we ask?

 1. The goal & problem

 2. The audience

 3. The service/product

 4. The moment

 5. The success metrics

 6. The Tech stack

Discovery

Session's objective:

Listen to the client, understand their needs, **ask the right questions**, don't leave without a clear understanding of the problem to be solved.



Time: 1 hour



Prof. Ro



Stakeholder

Let's look at some examples from Professor's experience!

Discovery

Session's objective:

Listen to the client, understand their needs, **ask the right questions**, don't leave without a clear understanding of the problem to be solved.



 Time: 1 hour



Stakeholder

Professor! I need your help, **our customers have stopped using our service**, our churn rate is over the clouds 😞



! Remember

Your client is the person who understands it's business the most, leave no question behind

THERE ARE NO DUMB QUESTIONS!!!!

Discovery

Session's objective:

Listen to the client, understand their needs, **ask the right questions**, don't leave without a clear understanding of the problem to be solved.



 Time: 1 hour



Stakeholder

Professor! I need your help, **our customers have stopped using our service**, our churn rate is over the clouds 😞



Prof. RO

Let me see:
Why did they stop?
Do you know their reasons?
When did it happen?
Tell me more about your service
What Churn rate % are you expecting to change?




Discovery

Session's objective:

Listen to the client, understand their needs, **ask the right questions**, don't leave without a clear understanding of the problem to be solved.

 Time: 1 hour

 You got a hint!

Stakeholder

Professor! I need your help, **our customers have stopped using our service**, our churn rate is over the clouds 😞



Prof. RO

Let me see:
Why did they stop?
Do you know their reasons?
When did it happen?
Tell me more about your service
What Churn rate % are you expecting to change?



Discovery

What should we ask? The goal & problem

What problem do you want to solve?

What is your objective?

Why do you want to solve it?

What business goal are we tracking with this solution?

Why is it happening now?

What happens if you don't solve this on the short, mid and long term?



Prof. RO

Alright then,
What's the goal for this experiment?
What do we want our customers to do?



Stakeholder

We want to help our new customers make their **first purchase** after successfully creating their account on the next 15 days.



The Goal

What are you hoping to achieve with your solution?

If you jump directly to designing your journey, without thinking of what goal to achieve, you'll hardly arrive to your client's business objective

SPECIFIC
Be concrete and simple

MEASURABLE
How will you size it?

ATTAINABLE
Be realistic, is it possible?

RELEVANT
Is it aligned with business goals?

TIME-BOUND
When will it happen?

Example:

“ Decrease churn rate from 36% to less than 30% on the next H (half year) ”

Rationale:

Our users have stopped using our app, leaving us with a huge churn rate that's leaving a finance gap, therefore we need to retain these users to help them stay on the service.



Discovery

What should we ask?

The audience

Who is the target audience?
(buyer persona)

What's the segmentation?

What's their main pain in this process?

Tell me more about them,
demographics, buying patterns,
interests, where are they?

When should they get out of the solution? Exit Criteria



Prof. RO

Who should we send this promotion to? Who's the best target audience?

What data do we have to create this segment?



Stakeholder

We want all our **active users on Britain** to receive it! Specially the ones that **have purchased our Apple pies in the past 3 months.**

Please don't include people **marked with gluten free diet.**



Audience segmentation



Define the right Data Governance to conquer segmentation

Do you have the right data available to run the segmentation?

Less can be more! Don't be afraid to target less people with the right message



Discovery

What should we ask? The service/product

Tell me more about your
service/product

Is it B2B or B2C?

How do people use it?

What are their key features?

What assets do you have
available to communicate?



Prof. RO

Can you explain to me more
about your app's key benefits?
Do you target B2B or B2C
audiences?

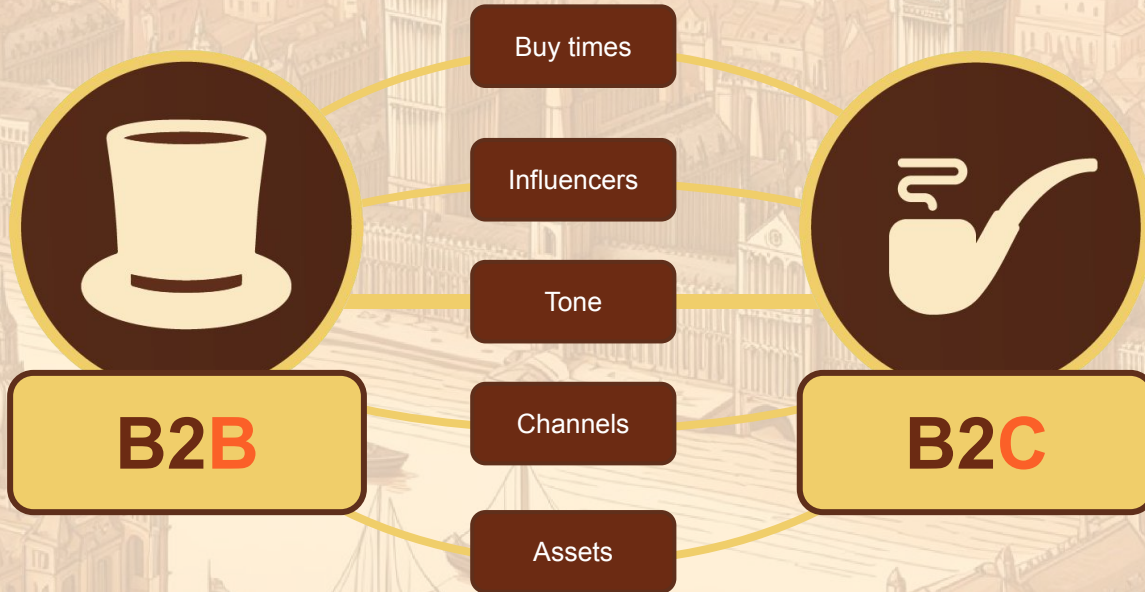


Stakeholder

Oh, we're definitely B2B!
Our financing app specializes in helping
CFO's to monitor their companies health
and enable a better finance strategy. It's
available on iOS and Android right now.



B2B or B2C, two different worlds





Discovery

What should we ask? The moment

When do we need to activate?

Is it time sensitive?

At what point in the customer's lifecycle does this solution come in?

Fixed point in time, or triggered by an action?



Prof. RO

Let's see if I got it right...
We need to send this personalized **push notification** to customers the moment they enter your local stores?
Do you have **beacons** in place?
How many stores will be active?



Stakeholder

Yes professor, **good catch** 🤩.
We're in the process of installing the hardware on 30 stores, they'll be ready to run next month. **Can we activate by then?**



Customer

Journey





Customer

Journey



Discovery

What should we ask? The success metrics

How will we measure the outcome of the experiment?
What will be the KPIs or success metrics?
Where can we listen to this data?



Prof. RO

How does this align with your business objectives?
How can we measure its success? What do we listen?



Stakeholder

Mmmh good question.
Our main goal is to migrate 80% of our analog users into our new digital service in the next Q.
We could measure the conversion rate! how many active analog users download the app and make their first digital transaction.



Success Metrics

Remember your goals? This is how we measure them

Every team is divided into different Business Units, and each stakeholder is measured with a different metric. Your job is to understand that metric, and help them get it right.

Goal

What's the business goal?
What do they want to achieve?

> Metrics

How do they measure them?
Where do they keep track of them?

> Solution

Knowing that, you can start designing your solution. NEVER before, as you'd be making assumptions at best.



Discovery

What should we ask? The Tech stack

What is the technology stack at our disposal to design the solution?

Where can we listen for this data?

How often is the information updated?

What channels do we have available to communicate with the target customer?



Prof. RO

Where can I listen for this information? Is it already connected to SFMC, or do we have to connect them? Do you have documentation on that particular system?

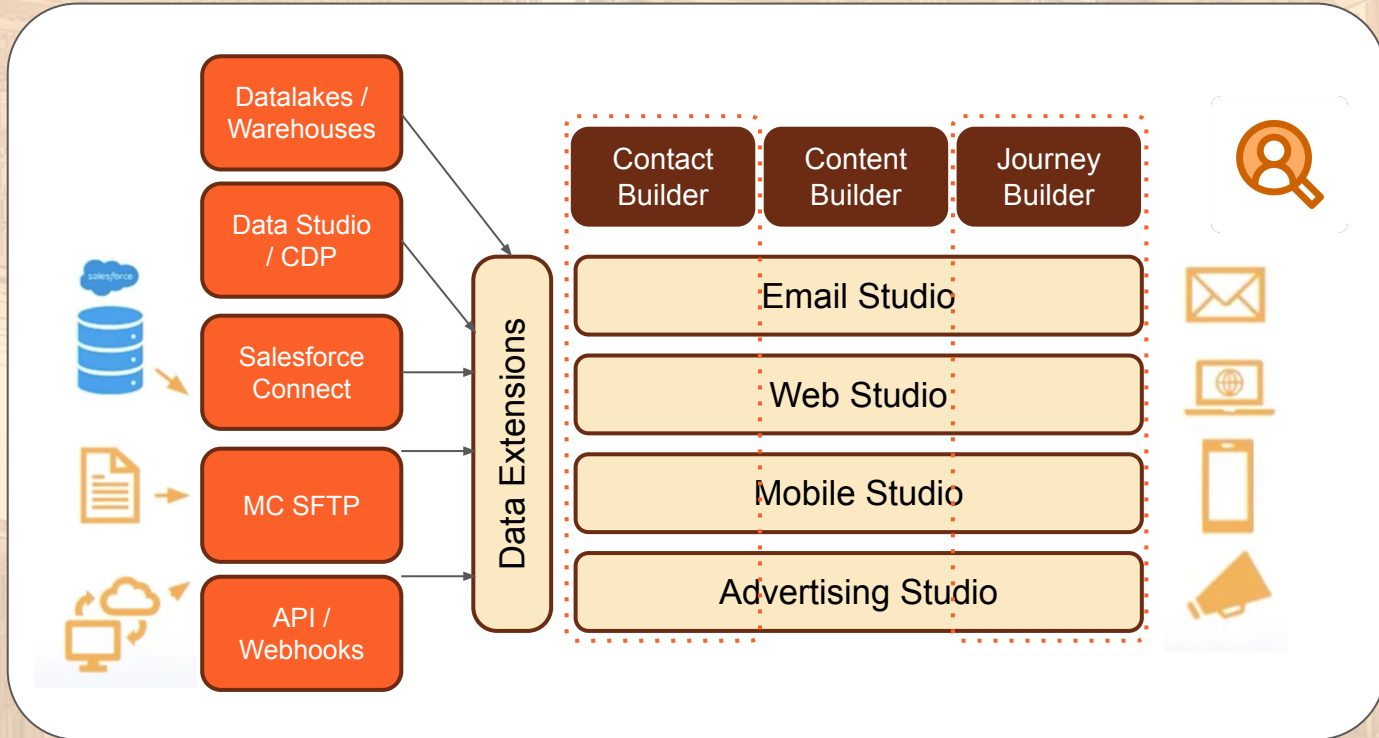


Stakeholder

It all lives in our inhouse CDP!
let me ask my IT team for documentation so your team can get to work, as we haven't connected it to SFMC yet.



Tech stack (SFMC Building Blocks)





Once you have all this information,

it's time to map your case to find the solution.



The Brief

It's your turn to connect the dots and design your connections, automations and journeys to kickstart your solution and **solve your customer's riddle!**



Brief example

Goal: Decrease churn rate from 36% to less than 30% on the next H (half year)

Audience: Users with more than 36 days without a single transaction

Product: Retail App

Moment: Retention

Success Metric: Less % of inactive users

Tech Stack: CDP, App SDK, SFMC



Happy path: The client does exactly what we want them to do

It's easy to design the path you want your user to follow, but is it the real one?

Real path: a chaotic experience where every client does different actions (or inactions), and we have to take them into consideration

It's not really the client's fault

In life, we have many distractions, messages that want our attention and activities that we prioritize.

It's possible that your user got that special promotion email, opened it, left the tab open and forgot about it because their grandma needed help getting something from the upper left drawer.

Be there for your users, don't be overwhelming (avoid FOMO at all costs) and send them promotions that are well-targeted to their needs, and you'll be doing a 100% better job than the rest of the brands.



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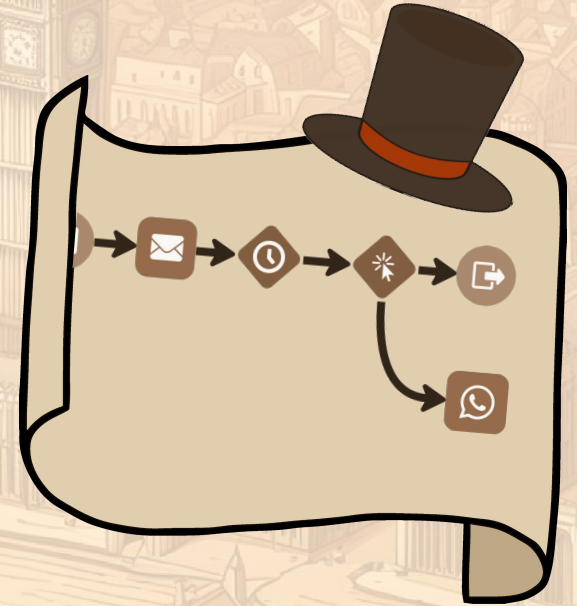
and the ART OF LISTENING

You're ready to solve the case!

- You made the right questions
- You have a clear goal
- Got the right data

You've unlocked **the Art of Listening** as part of your skill set, and you're ready to design your solution.

I wish you good luck, and success with your case!



Prof. Ro

Thank You!



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Let's connect! I'll be happy to talk:



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www.friendsofemail.com