

Choose the Right Agency for Implementation

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Problem

A leading e-commerce company in the food industry is preparing for a new implementation of Salesforce Marketing Cloud (SFMC). Alyse, owner of SwiftReach Marketing, was hired to implement marketing and transactional journeys. Upon



logging into the client's SFMC business unit, she noticed that the implementation was not set up correctly. The previous agency failed to set up Personalization (MCP), Reply Mail Management (RMM), and the Marketing Cloud Connector (MCC). Because of the lack of implementation their data hygiene took a critical hit with duplicate email addresses, but different unique identifiers.

Solution

Alyse imposed a solution which required the following steps:

- Create a list of items that still need to be implemented
- Data Hygiene
- Verifying Domains

The Implementation



1. Collaborate with the client and specify the needs that need to happen.
 - a. Elaborate on who to hire to achieve implementation
2. New Hire/Agency/Contractor to implement the following items:
 - a. RMM: Client Services (customer support) need to be able to reply to a customer's request when they respond to an email
 - b. MCP: when MCP is fully implemented, the client will have a more holistic view of what their customer does on their website, and will be able to send marketing emails targeted more towards their needs.
 - c. MCC: With MCC set up, the client now can view customer data that is held in Salesforce Core.
3. After implementation: SwiftReach Marketing will help with data hygiene. The first step is to remove all duplicates, and make sure that the unique identifier that stays is matched up to the Salesforce Core Unique Identifier.
4. After Data Hygiene, SwiftReach Marketing will set up automations, email and journeys to promote sales and subscriptions.
5. Monitor campaign performance metrics post-launch to assess the effectiveness of implementation.

Results

SwiftReach Marketing, another agency, and a Salesforce Guru worked together to make sure the Salesforce Ecosystem was set up, and that all implementation was completed correctly. Upon completion, automations, journeys, and campaigns were set up to ensure timely emails to customers. This includes the Back in Stock emails, Transactional emails, and some marketing/promotional emails.

The three parties were able to knock out the rest of the implementation in a few months, compared to the original agency having access to over 9 months.

Key Takeaways

1. Vet the agencies you plan to hire, and speak to past clients of theirs to ensure their capability.
2. Never sign off that an agency has performed their duty and tasks as outlined in the contract until you are satisfied.

Impact



Hiring an agency that doesn't produce quality implementations can set a company back by hundreds of thousands of dollars, or even millions. This not only includes the cost of hiring new help, but also the loss in sales during the original implementation and the fixing of the implementation.

This case study highlights the significance of proper implementation of salesforce Marketing Cloud.

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