

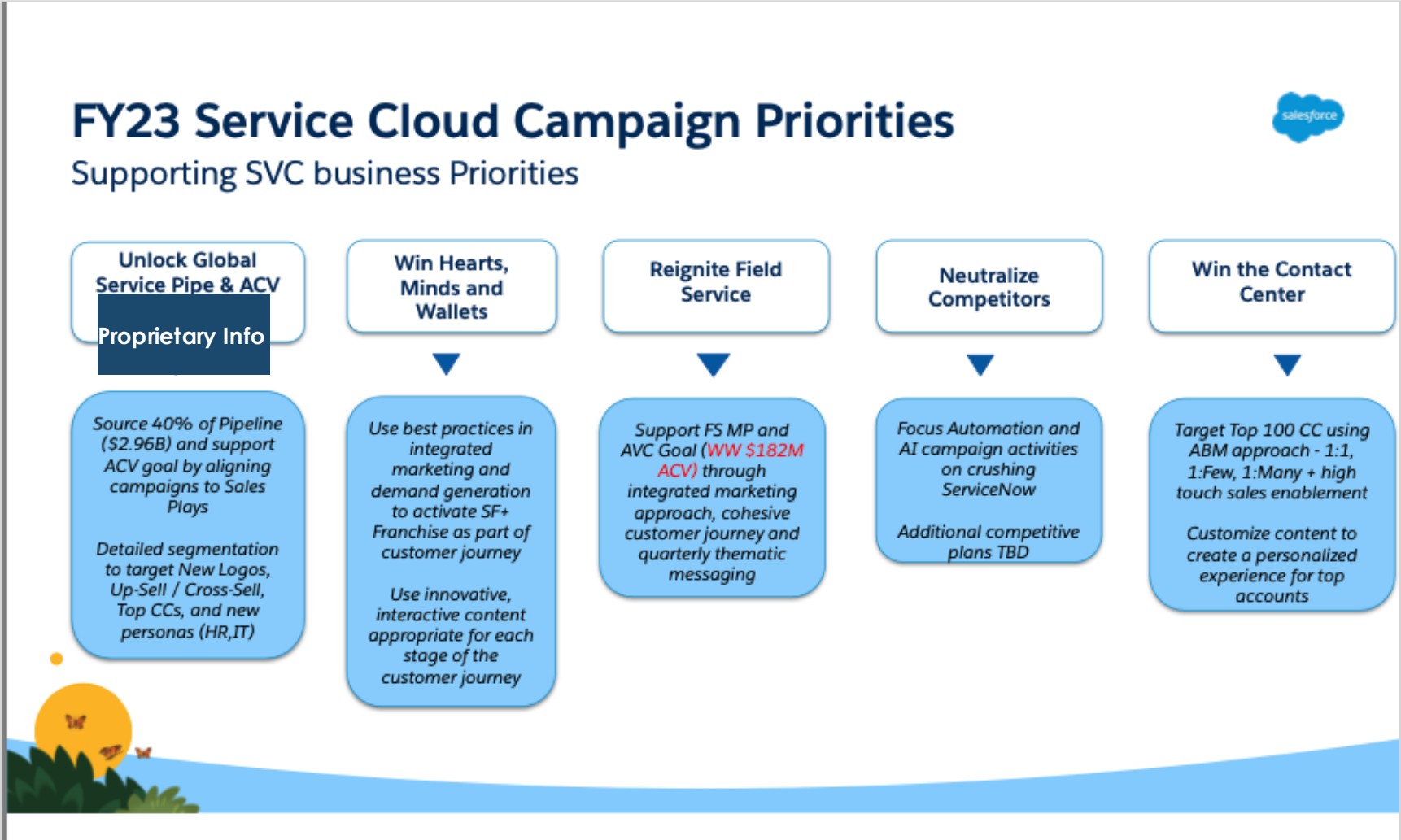
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Salesforce Work Examples

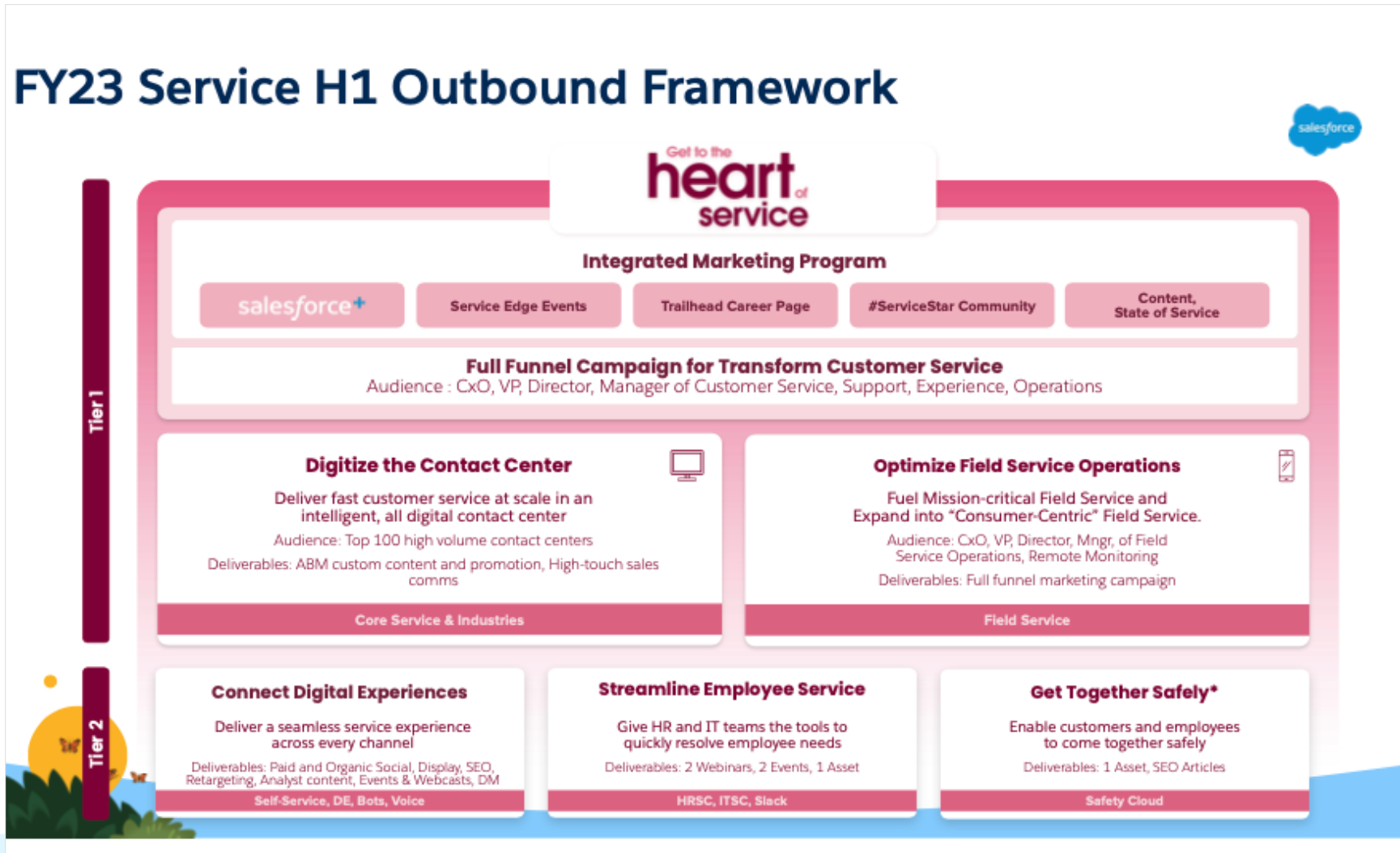
At Salesforce, I led the Service Cloud Campaigns team



Align Campaigns priorities with SVC Business Priorities



Create a Campaign Framework Aligned with Sales Plays, brand messaging



Target Audiences and Segmentation by Campaign

Service Leaders

We have 4 campaigns targeted to service leaders with different sub-sets based on GTM account lists



Sell new SVC, Expand; Traditional, High Touch

Core / Transform / Evergreen

Target Audience:

Mid-large B2B or B2C companies that have customer engagement centers with agents supporting complex customer interactions across multiple channels

CxO, VP, Dir, Manager of Customer service,

Segmentation Criteria:

Existing Customers - No Service Cloud + Salesforce Product + PTB Score above 3

New Logos - No Salesforce Product + PTB Score above 4

Upgrade Existing SVC

Automation / AI

Target Audience:

Mid-large B2B or B2C companies that have customer engagement centers with agents supporting complex customer interactions across multiple channels

CxO, VP, Dir, Manager of Customer service, experience, operations

Segmentation Criteria:

Has more than 20 SC Licenses + Lightning Enabled + No SC Einstein + Above 300 Cases/week

Has more than 20 SC Licenses + Lightning Enabled + No SC Voice + More than 2000 Cases/week

Upgrade Existing SVC

Connect All Digital Exp

Target Audience:

Mid-large B2B or B2C companies that have customer engagement centers with agents supporting complex customer interactions across multiple channels

CxO, VP, Dir, Manager of Customer service, experience, operations

Segmentation Criteria:

No customer Communities + CC PTB Score above 4

Has SF Product + No Digital Engagement + DE PTB above 4 + Lightning Enabled

Has SF product + No Service Cloud Voice + SCVoice PTB above 4 + Lightning Enabled

Sell new SVC, Expand; High Volume

Digitize Contact Center

Target Audience:

B2C, Low complexity, high volume contact centers; w/ agents supporting customer interactions across multiple channels. Digitizing is a strategic priority for the business.

CxO, VP / Head of Service / Contact Center, CIO / Head of IT, Chief Experience Officer, Chief Customer Officer, CEO / COO,

Segmentation Criteria:

Top 1000 Contact Centers List + Data Enrichment + PTB Score above 3

*CxO = C-Level audience - CEO, COO, CIO, CCO

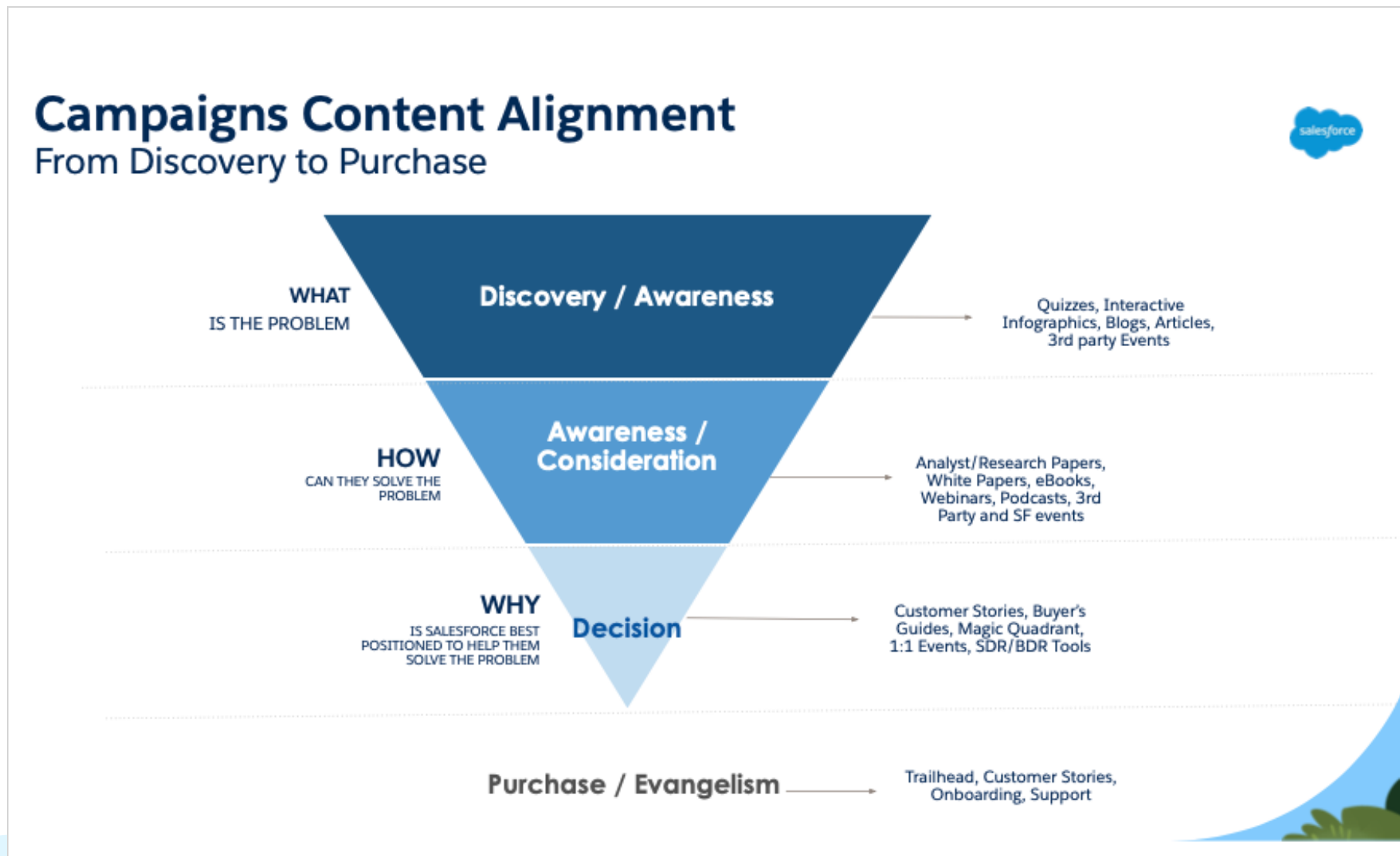
Aligning Channels with the Buyer Journey



Channels through the Buyer Journey



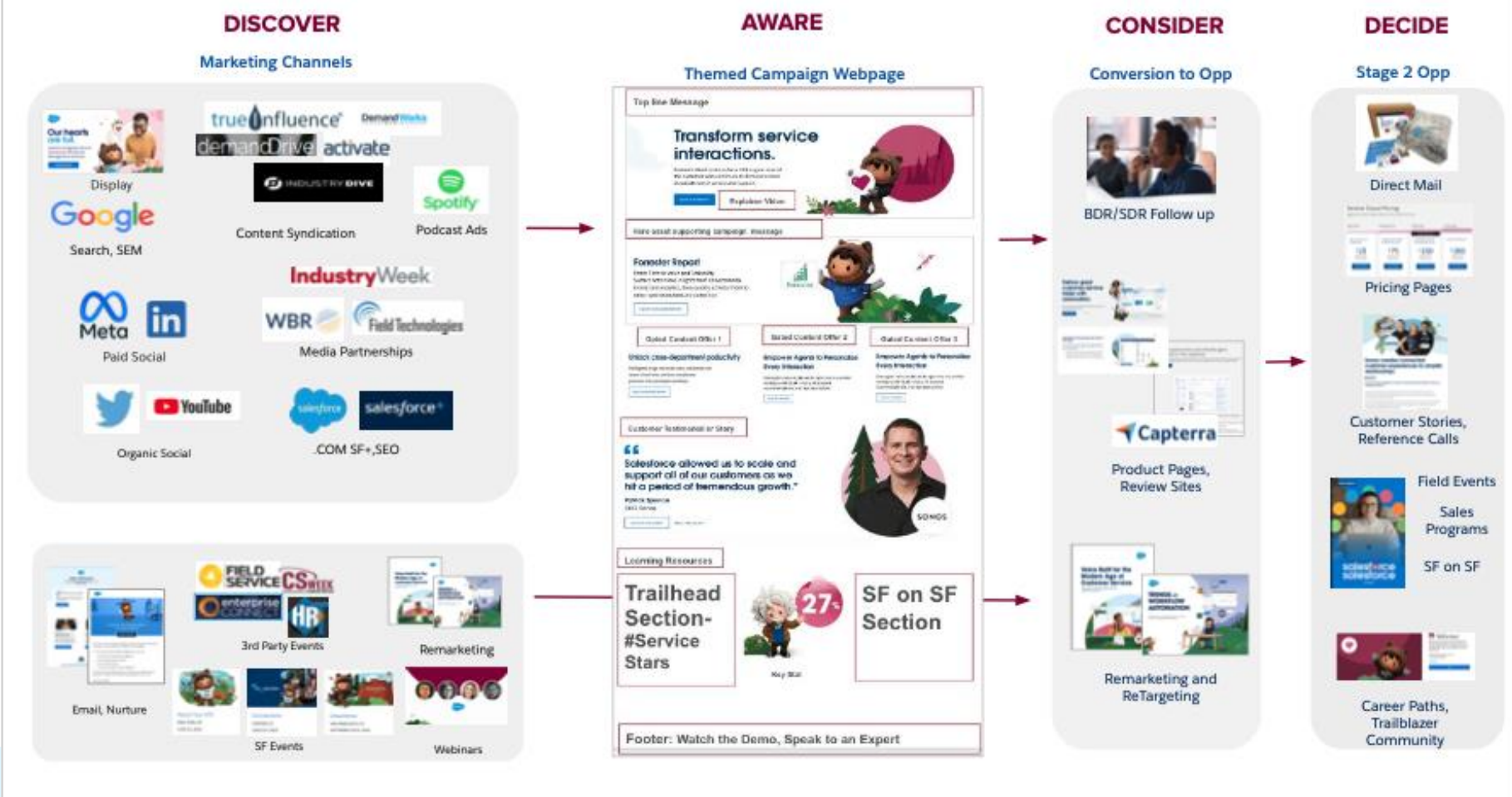
Aligning Content with the Buyer Journey



Example Integrated customer journey



An Integrated Buyer Journey Is...



Media Spend Example - All Campaigns



FY23Q2 Service Cloud Media Plan					TOTAL BUDGET:	Proprietary Info
Full Paid Digital Media Plan Across all LOBs		Service Titles	Q4 Incremental Doc			
Retargeting Assets						
Evergreen Campaign Details - Some budgets are estimated amounts as they are fluid between LOBs						
Campaign Details					Est. FY23Q2 Total	
Tactic	Vendor	Targeting	Objective	Paid Digital Owners	FY23Q2 Total	% Budget Allocation
ALL					\$535,000	100%
SEM*	Google	N/A	Decision	Cassie Huang		30%
SEM*	Microsoft	N/A	Decision	Cassie Huang		6%
Content Syndication	MadisonLogic	Top Accounts - US, Director+, CPL \$40	Consideration	Broden Chapman		6%
Content Syndication	DemandWorks	Top Accounts CPL - \$50	Consideration	Broden Chapman		6%
Review Sites	Capterra	FSM, Service Dispatch, Work Order, Help Desk, Customer Service, Live Chat, Call Center	Decision	Broden Chapman		6%
Review Sites	MVF	FS	Decision	Broden Chapman		6%
HQL	MVF	Field Service	Decision	Broden Chapman		6%
HQL	SoftwareAdvice	Help Desk	Decision	Broden Chapman		6%
Paid Social*	LinkedIn	DNR - Open Optys	Consideration	Jazz Supra		6%
Paid Social*	LinkedIn	RT-FieldService BOFU	Consideration	Jazz Supra		6%
Paid Social*	LinkedIn	RT-FieldService MOFU	Consideration	Jazz Supra		6%
Display*	Adroll	Look Alikes/Custom Intent/Topics	Consideration	Jamaal Saunders		6%
Incremental #1 Details - Overall Core + Add Ons + FS						
Campaign Details					FY23Q2 Total	
Tactic	Vendor	Targeting	Objective	Paid Digital Owners	FY23Q2 Total	% Budget Allocation
ALL						100%
Content Syndication	MadisonLogic	Core Accounts - US, Director+, CPL \$40	Consideration	Broden Chapman		4%
Content Syndication	TEC	Core Accounts - US, Director+, CPL \$25	Consideration	Kristen Cobb		5%
Content Syndication	BusinessSoftware	Customer Service Topic	Consideration	Kristen Cobb		4%
Content Syndication	DemandWorks	Top Accounts CPL - \$50	Consideration	Broden Chapman		5%
Content Syndication	Integrate	Open Optys - \$45	Consideration	Kristen Cobb		4%
Content Syndication	ZiffDavis	Open Optys - \$57	Consideration	Kristen Cobb		2%
HQL	Software Advice	Core Service	Decision	Broden Chapman		3%
HQL	IT Central	Core Service	Decision	Broden Chapman		3%
Paid Social	Meta	Core Account List	Consideration	Jazz Supra		8%
Paid Social	LinkedIn	DNR Open Optys	Consideration	Jazz Supra		2%
Content Syndication	DemandWorks	FS Accounts - US, Director+, CPL \$50	Consideration	Broden Chapman		5%
Content Syndication	MadisonLogic	FS Accounts - US, Director+, CPL \$40	Consideration	Broden Chapman		4%
Content Syndication	TEC	FS Accounts - US, Director+, CPL \$25	Consideration	Kristen Cobb		5%
Content Syndication	Business Software	Field Service Topic	Consideration	Kristen Cobb		4%
Content Syndication	Integrate	FS for MFG	Consideration	Kristen Cobb		2%
Content Syndication	Activate	New Activate format - Field Service	Decision	Broden Chapman		6%
HQL	MVF	Requested Field Service quote, project within 12 months, budget in place, DM or Influencer	Decision	Broden Chapman		3%
Paid Social	LinkedIn	PG Persona	Consideration	Jazz Supra		3%
Content Syndication	DemandWorks	DCS Accounts - US, Director+, CPL \$50	Consideration	Broden Chapman		5%
Content Syndication	MadisonLogic	DCS Accounts - US, Director+, CPL \$40	Consideration	Broden Chapman		5%
Content Syndication	TEC	DCS Accounts - US, Director+, CPL \$25	Consideration	Kristen Cobb		3%
Content Syndication	Activate	New Activate format - DCS assets	Decision	Broden Chapman		6%
Paid Social	Meta	Employee Service TAL + Persona targeting	Consideration	Jazz Supra		2%
Combo	Review Sites	Capterra	Core + FS - FSM, Service Dispatch, Work Order, Help Desk, Customer Service, Live Chat, Call Center, Conversational AI Platform	Decision	Broden Chapman	5%

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Campaign Example



Campaign Audience, Objectives, Messages

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Transform Customer Service - Overview

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Target Audience

- Mid-large B2B or B2C companies that have customer engagement centers with agents supporting high complexity customer interactions across multiple channels
- CxO, VP, Dir, Manager of Customer service, experience, operations
- Industry Targets: Manufacturing, Professional Services, Healthcare & Life Sciences (e.g. medical devices, pharmaceuticals)
- Company Example: Honeywell
- Segmentation Criteria:
 - Existing Customers - No Service Cloud + Salesforce Product + PTB Score above 3
 - New Logos - No Salesforce Product + PTB Score above 4

Competitive

- Salesforce has been ranked as the #1 service solution by Gartner for 13 years
- Salesforce is truly a low-code, no code platform
- Set up is easy -Service Set- Up Assistant can get you up and running in days

Campaign Objective

- Support \$2B MP Goal
- Generate qualified leads, capture new logos

Campaign KPIs

- MP and ACV generated from overall program, individual channels and content
- Marketing channel level metrics and optimization

Key Message

- Connect every channel, personalize every engagement, empower everyone with automation
- Increase customer satisfaction and agent engagement with service connected across every channel - all powered by data and AI-powered automation to drive personalization and efficiency at scale.

Messaging References

- [Sales Playbook](#)
- [First Call Deck](#)
- [Messaging Hierarchy](#)
- [Messaging BOM](#)

Messaging Example - Deeper Dive



Campaign Message & Audience



Low complexity, high volume contact centers; customer interactions across multiple channels

Key Messages		
Efficiency Automatically answer routine questions Increase first call resolution Agents can handle higher value interactions and deliver the personalized service that creates lifetime loyalty	Cost Savings Reduce call volume, deflect calls altogether, and avoid unnecessary callbacks	Productivity Agents are connected to other departments so they can take the right action at the right time Agents can cross/upsell during their interactions
with real-time data, automation, and intelligence		

• **77%**
of agents say their role is more strategic than two years ago

91%
of customers say a positive customer service experience makes them more likely to make another purchase

83%
of customers expect to engage with someone immediately when contacting a company



Map Messaging to Funnel Stages and Content



Messaging, Content, Gap Analysis

	Discover	Awareness	Consideration	Decision	Evangelize
Customer Mindset	WHAT IS THE PROBLEM?	HOW CAN I SOLVE THE PROBLEM?		WHY IS SALESFORCE THE BEST CHOICE TO HELP ME SOLVE THE PROBLEM?	
Communication Goal	Discover Service Cloud via external, credible sources. Deliver content that speaks customers' natural language and addresses their most pressing challenges.	Educate, inspire, and define relevant change in their world. Help them find solutions to their challenges.	Showcase Service Cloud (and SFDC) as a trusted source of credible information that helps customers develop knowledge and solutions	Prove Service Cloud (&SFDC) solutions work to solve their problems. Support the business case or consensus with peer influencers and decision makers.	
Key Campaign Message (Use Customer Mindset and Communication Goal as a Guide)	<p>The customer service landscape has become a hybrid remote model, resulting in the need for more technology innovation than ever. Customers continue to demand a more elevated level of service and support, and engagement centers have had a hard time keeping up with technology and processes that will allow them to quickly adapt and scale. Existing systems, processes, and solutions are no longer enough.</p> <p>As a result, customers are having negative experiences and defecting at a higher rate; agents are inefficient, disconnected, and untrained, and they are leaving jobs that aren't designed to help them improve. Efficiency is low and operating costs are getting higher and higher. And the IT department is expected to solve this problem by connecting systems that weren't designed to connect.</p> <p>Customers are feeling more and more anxious, agents are highly stressed, and service leaders are pressured to solve this problem.</p>	<p>Transform your systems and processes to increase the operational efficiency, knowledge, and expertise of your agents and engagement centers so that you can create positive customer experiences, build employee loyalty, and increase revenue.</p> <p>Customers like RBC Wealth Management, Honeywell, SONOS and Realtor.com have achieved success</p>		<p>Salesforce can help agents:</p> <ul style="list-style-type: none"> Connect and action on data from anywhere using a single, 360 view of customers through 1 connected platform Connect every touchpoint, driving omni-channel engagement Automate workflows to streamline repetitive tasks, gain operational efficiencies Handle common requests using AI chatbots ...so that agents can provide an elevated level of service. <p>Salesforce can help leaders:</p> <ul style="list-style-type: none"> Increase operational efficiency, lower costs, and gain revenue Grow lifelong customers through connected, personalized service <p>Salesforce has been ranked the #1 Service platform by Gartner MQ for 13 years running</p> <p>Customers like Smile Direct, One United Bank have achieved success with our solutions</p>	
Supporting Content [In conjunction with Content team, PR/AR, Customer Marketing, PMM]	<ul style="list-style-type: none"> Blogs And Articles: <ul style="list-style-type: none"> How Slow and Steady Will Win the Service Automation Race (by a trailblazer) Before You Automate, Create a Customer Service Process Map – Here's How Forrester Video Series Interactive Game - Workforce Engagement Salesforce eBook: Customer Service Workflow Automation 	<ul style="list-style-type: none"> Trends In Workflow Automation -ICMI State Of Workforce Engagement Automation - F&S: Putting Customers at the Center: A 360 Degree View Forrester: CX Participation is Vital to Automation Success BASHQ Incident Management White Papers (x2) 4 Steps to Easily Automate Your Customer Service Workflows 	<ul style="list-style-type: none"> Webcasts 2/Year 3rd Party Event - SWPP 	<ul style="list-style-type: none"> Customer Stories -SmileDirect, OneUnited Bank Gartner Magic Quadrant State of the Connected Customer - SVC Version Demo Videos Sales Enablement Decks 	<ul style="list-style-type: none"> Trailblazer stories Trailblazer Career Path #servicestars

Create content-driven buyer journey

Digitize the Contact Center Journey

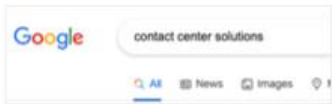
Discover



PR Announcement



Infographic
Video, Blog



SEO / SEM

Aware



Dreamforce On-Demand
Keynote/Gated Content



State of Service
Spotlight - Contact Center



[Delivering on the Multichannel Experience: A Unified Approach Supported by Automation](#)

Consider



Webinar: Creating
Efficiency in High
Touch Service
Centers



Voice Built for the
Modern Age of
Customer Service

Decide



NEW
Contact
Center
Demo and
Sell Sheets



Trailblazer
Community

Media Spend Example - Campaign-level



Transform Customer Service - Spend & Media Strategy

	Strategy and Desired Action	Goals	Tactics	Performance KPIs	% Budget
Discover	1st Touch Lead Quality: Low Action: Visit site, engage	Site Traffic Session time Bounce Rate Stage 1 - Opportunity (Response)	<ul style="list-style-type: none">• Programmatic Display• SEO and SEM - Non-branded• Content Syndication• Paid Social - LinkedIn• Organic Social - LI, TW, YT• Remarketing and Retargeting	<ul style="list-style-type: none">• Session time• Bounce Rate• Response Rate (ROI)• Conversions• Organic engagement	15%
Aware	2nd Touch Quality: Med/Low Action: Form complete, engage email, social	New Contact Acquisition Stage 1 - Opportunity (Response) Drive pipeline	<ul style="list-style-type: none">• Keyword-based display• Email - DEE and Nurture• Content Syndication• Paid Social - LinkedIn, TW• Remarketing and Retargeting• 3rd Party events• Webcasts	<ul style="list-style-type: none">• Conversions from Discover > Awareness• Conversions to Stage 1• CTR from Display, Social, Remarketing and Retargeting• CTOR email• Leads - Webcasts & Events• MP from Stage 2 Opps• New contacts - Content Synd.	70%
Consideration	3rd Touch Campaigns Quality: High Action: Form complete, engage events, email, social	Drive/mature pipeline and ACV Stage 1 and 2 Opportunities (Response and progression)	<ul style="list-style-type: none">• Branded SEO and SEM• Email - DEE and Nurture• Content Syndication• Paid Social - LinkedIn, TW• 3rd Party and SF events• Webcasts		
Decision	Bottom Funnel Quality: High Action: Form complete, engage BDR, DM, Demo	Drive/ mature Pipeline and ACV Stage 2 - Opportunities	<ul style="list-style-type: none">• Review Sites• HQL• Branded SEO and SEM• Email - DEE and Nurture• BASHO Emails• Direct Mail	<ul style="list-style-type: none">• MP from Stage 2 Leads• CTOR - Email• DM usage and conversion	15%

Screenshot