

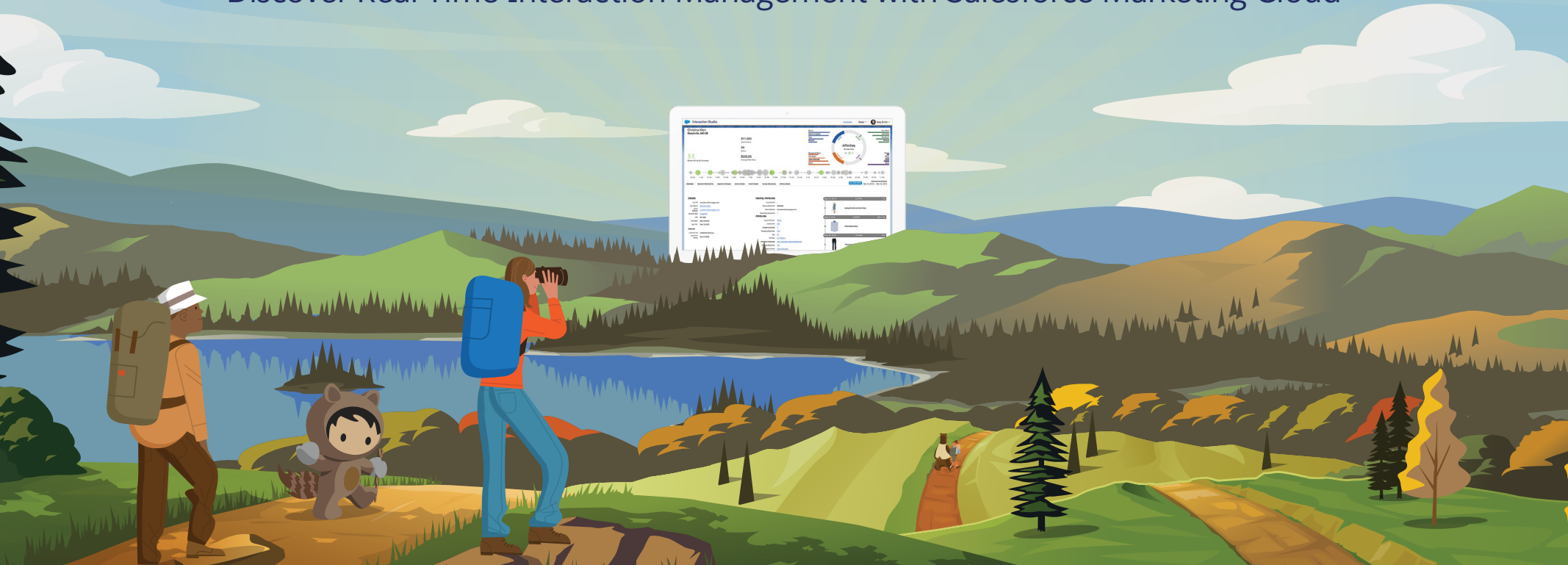


salesforce

Inspire

INSTANT ENGAGEMENT

Discover Real-Time Interaction Management with Salesforce Marketing Cloud



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I'm Astro

Your Trail Guide for Salesforce

Astro and friends love showing Trailblazers like you around Salesforce and its many business solutions.



The challenge is clear. Consumers are loyal to experiences, not companies. In fact, 52% of B2C customers say they'd switch brands if they didn't feel they were getting a personalized experience. No one wants to lose half their customers to the competition.

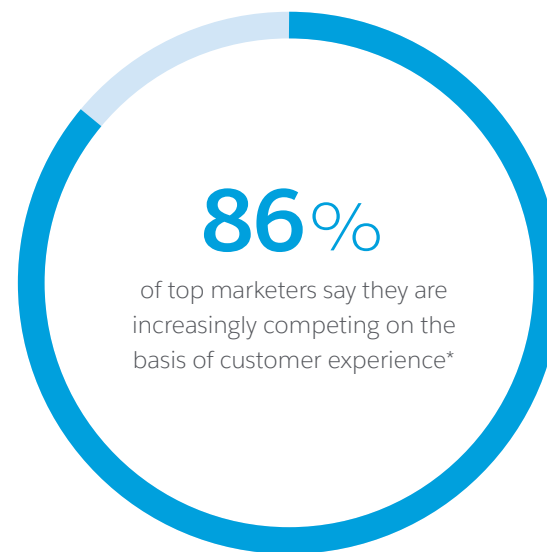
And because consumers are humans – with a never-ending evolution of needs, passions, distractions, and desires – marketers need to develop strong, adaptable relationships with them by inspiring timely, relevant engagement everywhere a consumer interacts with a brand.

But that's easier said than done. Many marketers are using disparate tools to manage channels, causing a disconnected experience for consumers. Plus, data regarding each individual isn't shared between departments, which means multiple teams are trying to market to the same consumer. In short, there's a lack of internal governance over marketing campaigns.

All this is happening while connected consumers are expecting incredible relationships and brand experiences. They're so used to seeing their names in subject lines or tailored offers in their social media news feeds, consumers are embracing the brands that can go beyond those simple examples of personalization.

That's where real-time interaction management (RTIM) can help. In the following pages, we'll:

- Define real-time interaction management
- Walk through strategy
- Address what to look for in an RTIM tool



*Salesforce's Fourth Annual "State of Marketing" Report, 2017

CHAPTER ONE

What is real-time interaction management?

Real-time interaction management, or RTIM, is an essential tool for all marketers. RTIM is the ability to capture real-time consumer insights, and then use them to bring true personalization to every interaction with your brand – all in an instant.

Why is it important?

RTIM makes the personalized experiences that consumers expect possible. Marketers can coordinate interactions across owned channels for seamless, connected interactions. Consumers will receive the next best action or offer in the exact moment when it's likeliest to inspire action.

More specifically, RTIM consists of five pillars for personalizing the consumer experience:

Recognition

Consumer profiles are no longer just made up of demographic or geographic data. RTIM can help identify consumers across offline and online touchpoints, collecting and organizing data to express the real behaviors and desires of actual human beings. Plus, RTIM tracks both authenticated and unauthenticated, meaning known and unknown, consumers in every interaction.

Context

Consumer data profiles shouldn't be just about search or purchase history. That's only a one-sided view of an individual. RTIM can capture every activity across multiple channels, thus providing real-time, relevant insights on consumer behavior.

Next Best Action

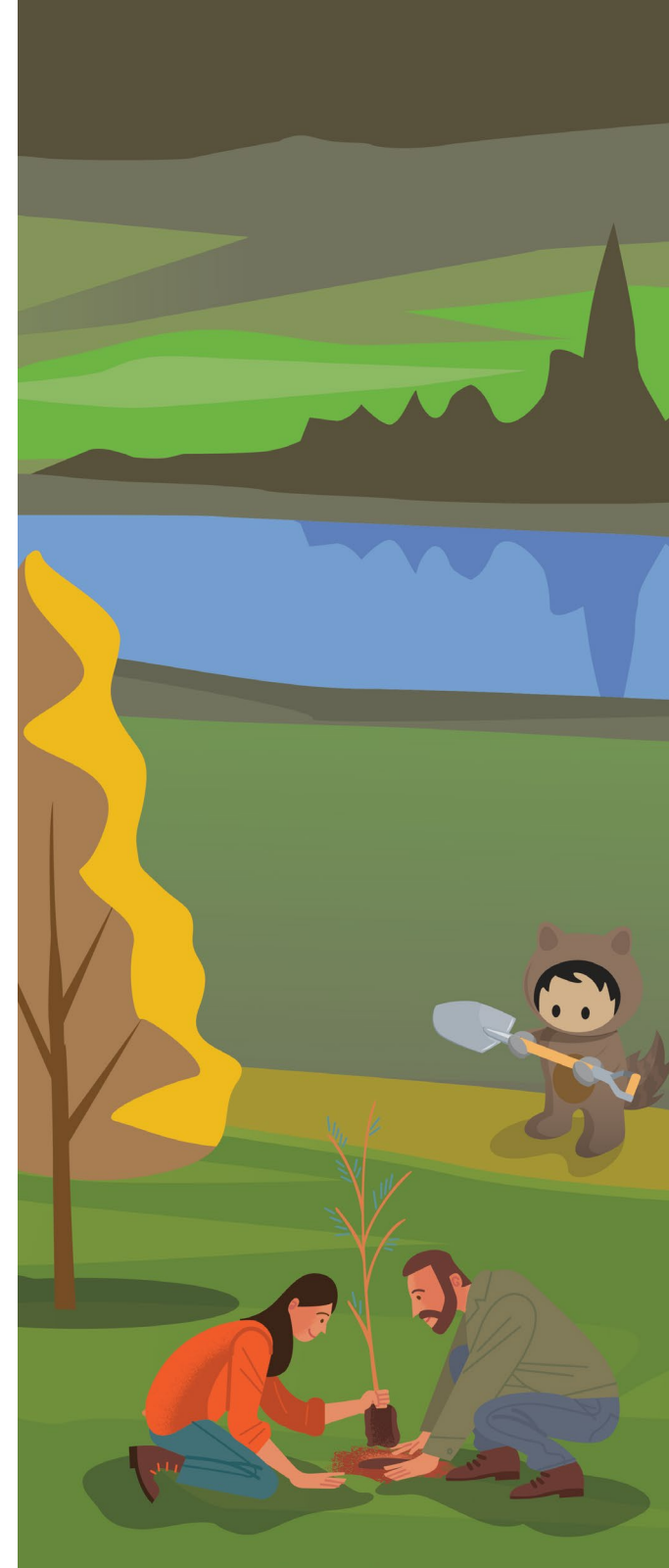
Now you can recommend the next best action, call to action (CTA), or content using the consumer's comprehensive data profile. RTIM helps you determine each specific offer, content, or message automatically – designed to inspire engagement from the consumer.

Orchestration

Each consumer is unique. You need to be able to deliver a message that will be most likely to engage on the channel of each individual's choosing. RTIM can coordinate delivery of next best action to the right touchpoint at the right time – for every consumer.

Optimization

Marketing strategy is an ever-evolving plan. Consumer behavior changes. Trends change. RTIM can provide insights for ongoing interactions and strategic planning – helping you continually get the best results from your marketing strategy.



CHAPTER TWO

Build your marketing strategy.

The success of your strategy hinges on two factors: your team and the actual plan to activate real-time interaction management. Let's dive into each.

Your Team:

Every team needs a Trailblazer. What is a Trailblazer? It's a leader, an innovator, a motivator, someone with vision. It's somebody who can align your teams internally and make everyone believe in the mission.

For many brands, it's people like the chief marketing officer, chief design officer, chief experience officer, or chief innovation officer. They, or others like them, are the ones who have a vision for transforming the way a team thinks about personalization. Plus, they can govern strategy across the marketing, sales, and service departments. They drive decisions and execution across teams, and they care about personalization in terms of how it affects revenue and customer retention.

And because a consumer never considers every touchpoint with those departments as different brand experiences, the role of the Trailblazer must be to create seamless interactions. The goal is for every touchpoint to be seen as part of a continuous, flawlessly connected experience across channels.

RTIM can help consumer-centric companies meet their business objectives. This, in turn, increases brand loyalty from consumers – and that makes Trailblazers happy.

Your Plan:

The cornerstone of a true 1-to-1 personalization is real-time data. With the number of touchpoints available to each consumer for interaction with a brand, marketers need a robust solution not just for collection and organization of data, but to pull consumer intent from that information.

With RTIM, you have access to complete and actionable real-time interaction data. Collect insights from any owned channel, store them in an engagement profile, and activate them to strengthen personalized consumer relationships through every interaction with your brand and products. With real-time data, combined with data collected from other sources, you'll be able to recognize each consumer as an individual – and treat them as one as well.

It's important to approach your strategy with a clear understanding of scope and objective. What is your focus? Is it a real-time offers program that can increase campaign conversion, or something else? Hint: Being laser-focused on a specific use case in your consumer experience is a great way to start. Choose one goal to start. Make it easy to measure and achieve.

Once you've successfully identified which part of the consumer journey to personalize, it's easier to move on to a larger project. You'll have context for the consumer, a better understanding of how to execute and achieve your goals, plus you'll already know what's worked for you in the past.



CHAPTER THREE

Here's what to look for in a real-time interaction management solution.

Once your strategy and team are in place, it's time to start guiding consumers through every experience, on every channel, with your brand. To do that, you need a tool that's capable of omni-channel messaging and engagement, aligning every experience at every touchpoint.

A good RTIM solution will help you:

- Align the consumer experience across your departments
- Increase the ability to adapt engagement to consumer behavior
- Bring more value to consumer relationships

An RTIM solution must capture every event, conversation, and interaction across owned channels, both online and offline. That's email, mobile, apps, the web, call centers, outbound direct mail, in-store, or social media. Whenever and wherever your consumers interact with your brand, engagement must be consistent across all channels.

Here's how a good RTIM does it:

It must act instantly.

Today's connected consumer expects immediacy. Whether it's by purchasing something online, opening a service case, or simply clicking somewhere on your website, individuals expect the next offer or interaction to build on the previous one. A good RTIM solution must act in real time to meet consumers' expectations.

It must be context-driven.

Not only can you have a comprehensive data profile for each individual, you can glean contextually relevant insights on every interaction. Understand each customer's behavior and the decisions that drive it in the moment and adapt your strategy to their intent. Additionally, take relevant action immediately in the context of the customer's entire journey.

It must be omni-channel.

Consumers aren't all on just one channel. Each individual has a favorite, or in many cases, more than one favorite. A good RTIM solution must be able to capture every interaction, uniting all the information you have on each customer. Then, determine the next best action and deliver it to the proper channel or channels – all while scaling over time as your business grows.

It must be flexible and easy to use.

Strategies change often, so you need a RTIM solution that can scale and adapt. Learn continually using smart technology, algorithms, AI, and machine learning to understand how customer intent changes over time. Whether it's changing business rules to optimize decisioning logic, adding additional channels, or adding external systems – such as databases, CMS, or CRM – the right RTIM solution should do it all.



CONCLUSION

Manage real-time interactions with Salesforce Interaction Studio.

Visualize how individuals are progressing across touchpoints on all your channels. Easily apply business rules to determine the eligibility, prioritization, and validity of content and offers so consumers receive the best interaction. Manage the consumer experience by emphasizing critical offers and messages, and pause irrelevant interactions or offers through suppression. Limit the number of times a piece of content can be seen before it's replaced, decide which offers should be removed altogether, and orchestrate campaigns across every channel.

Interaction Studio can help you:

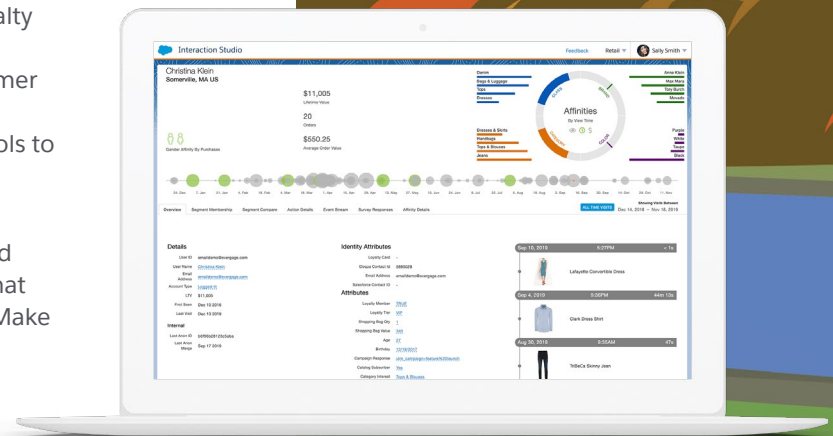
- Improve marketing campaign performance
- Increase relevancy and personalization
- Increase engagement
- Improve relationships with consumers

Interaction Studio is a cloud-based engagement layer that works with and across your existing systems. Liberate your data from functional silos to provide real-time analysis and actionable insight across individual consumer journeys. It won't replace existing technology, and you don't need to manage periodic upgrades. Interaction Studio integrates with Journey Builder, Email Studio, or any other systems of engagement.

Interaction Studio has features to impact the entire business.

- **Increase conversions** with campaigns, personalized content, next best action, and next best offers
- **Onboard customers** with lifecycle insights and optimization
- **Increase first-call resolution and decrease average call-handling time** with self-service customer care
- **Retain more customers** with renewals, relevant and timely campaigns, and targeted next best offers
- **Create brand advocates** with loyalty programs, improved customer experiences, and proactive customer service
- **Boost lifetime value** with new tools to cross-sell and upsell

No other RTIM platform is as light and agile or delivers the speed-to-value that top marketers and executives need. Make the perfect matches between products and individuals – strengthening your consumer relationships with every step.



Want to learn more?

Go to sfdc.co/interaction to request a demo.



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