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HOW THIS NON-PROFIT CLIENT STREAMLINED AND CLEANED THEIR CONTACT LIST IN MARKETING CLOUD

ABOUT THE CLIENT

The client is a non-profit organization that works for the incarcerated. They believe that everyone deserves a second chance and have been working on the same principle since 1976.

CONTEXT

The client team uses salesforce Salescloud CRM as the source of all their data. They have been doing so for a long time and have recently started seeing duplicate (sometimes more) records with the same email address. Apart from the same email address existing multiple times, which tends to happen in an instance after long term usage, their advocates and subscribers have been receiving unwanted communication owing to this issue. This has led to a decrease in deliverability and an increase in complaints. The contact list also is in need of cleaning due to a significant number of email addresses and numbers that have over time become obsolete.

OBJECTIVE

The objective for the project was to clean their contacts and create a process that would keep the contacts list up-to-date and relevant for time to come. The objectives can be broken down to a few points. To make sure that only relevant are being synchronized into the marketing cloud. The other major objective of the project was to sort out the records relevant and active subscribers from the inactive ones along with keeping a single record for one email address or number.

SOLUTION

The challenge presented by the business to the team was as exciting as it was technical. Genetrix team came up with an ingenious solution where we would cater to all the problems in the PFM contact list with the help of few automations. Firstly, a field was created in Salescloud that would trigger whether the records are eligible to be synchronized to marketing cloud. This was done to make sure that only the records that would be sent emails and SMSs in the up-coming days are being added to the all-contacts list. Since, every send-able record is counted towards the total contact count (which salesforce charges for), it only seems logical to bring over the required subscribers.

Subsequently, the automation was developed to first identify all the records that have lost their relevance in the marketing cloud instance and then proceeding to remove them from the all-subscribers list. These included all the subscribers that have been marked held; all the records that have more than one occurrence in the all-subscribers list; all the records that had entered marketing clouds as leads and now have been converted to accounts or contacts. Along with deleting these records, we also made the decision of extracting the tracking information related to the email and SMS sends that were performed on these specific records from marketing cloud. This automation would result not only in cleaning the all subscribers and all contacts list, it would also lead to a cleaner marketing cloud instance on the whole with only updated data stored in the tracking data extensions. Additionally, to keep marketing cloud and salescloud in sync, the identified records were marked undeliverable in salescloud as well. This measure prevents the records from resyncing to marketing cloud until they have been updated.

Before we finally deleted the identified records, we sent an SMS to the non-engaged numbers asking them to register with their email address in an attempt to increase engagement. The interested subscribers were kept with updated information and the rest were deleted from the database.

The automation created were set to run monthly to keep the database fresh and improve deliverability and subscriber-engagement. A monthly report was sent to the stakeholders providing the details of subscribers to be deleted.

OUTCOME

The solution that was delivered to the team has helped resolve the issues that they were facing with subscriber communication. We also provided them with a better data ingestion system, where only the most relevant records would be synchronized to the marketing cloud leading to stream-lining of their data streams. Additionally, our solution to send all the un-engaged subscribers an SMS before we delete them- not only re-engaged those subscribers, it also provided PFM with updated information about the subscribers. These resulted in an upgraded data bank which will be used in upcoming campaigns.

CONTACT

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