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HOW MARKETING CLOUD EMAIL SEND PERFORMANCE DASHBOARDS IN SALESFORCE PROVIDED REAL-TIME EMAIL ANALYTICS TO A HEALTH-CARE CLIENT

ABOUT THE CLIENT

The client, is a budding healthcare provider who believes in providing holistic care to people who opt for their services. They assist in long term chronic disease management by using efficient monitoring by a talented team of healthcare providers.

CONTEXT

The client team wants to utilize both sales cloud and marketing cloud as they have been using Salescloud as a database of records. Having set up their marketing cloud recently, they are willing to use both platforms to their full capacity. The emails that the marketing team has been deploying for their users and health-care providers regarding the latest updates in the program and weekly/quarterly newsletters, need to be monitored for traction by the sales team as well.

OBJECTIVE

The client's marketing and sales team wanted to be on the same page when it came to the tracking of emails being sent to the users and health-care providers. The teams also wanted to make sure that the roles remained cloud specific. The tracking information of the emails sent through marketing cloud needs to be analyzed by both the marketing and sales team for planning of upcoming campaigns. Tracking information also helps the team keep a tab on their users and how they have been responding to the health updates being sent to them regularly. This will also lead to improvement in the programs being developed for future patients.

SOLUTION

As soon as the clients's team laid out their requirements before the Genetrix Technology team, we knew what they needed was a sophisticated Marketing Cloud Individual Email Results Reports (IER) Dashboard. The dashboard helps in displaying an overview of all the emails and campaigns that have been planned and deployed in marketing cloud. This cross-cloud feature helps marketers and sales teams plan and analyze their current and future campaigns. This also leads to an increase in the transparency between the marketing and sales teams, without either team encroaching on the other's jurisdiction.

Since we had already configured their marketing cloud org, we had all the reports configured for their future and immediate use. We designed a dashboard keeping in mind the sales team and the parameters they would be analyzing. We created IER reports for various email tracking measures like total emails sends, Emails bounced, Email Open Rates, Email Click Rates, Total unsubscribe rates etc. Apart from that we also configured IER reports for different types of emails being sent based on the campaigns, email types (whether they are regular emails or triggered emails), and emails based on different template types. This would assist the team to analyze the campaigns that have been planned for the future. The dashboard is refreshed daily, hence providing real-time analysis for the team.