



## HOW SALESFORCE AND MARKETING CLOUD BI-DIRECTIONAL CONSENT SYNC IMPROVED DELIVERABILITY AND CUSTOMER SATISFACTION FOR THIS LIFE-SCIENCE CLIENT

### ABOUT THE CLIENT

The client provides transfusable components to various medical institutions. They aim to improve the supply chain between the donors and the institutions that need platelets. They have taken on the noble task of obtaining pathogen free blood platelets and providing them to the hospitals as and when they need it.

### OVERVIEW

The client uses Salescloud and Marketing Cloud for all their sales and marketing activities. They have a team of talented marketers and salespeople who have work behind the scenes in provision of healthy blood platelets to the hospitals. Both the teams have been working together for quite some time, but with a gradual increase in the database, there was also an increase in the disparity between the data in two clouds. These disparities were even more evident when unwanted emails and SMSs were being sent to donors, resulting in complaints. Since, consent is a very important issue when it comes to sending commercial messages, the solution had to be implemented as soon as possible.

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### OBJECTIVE

The principal objective of the project was to build a solution that would ensure that the consents expressed by the donors are being synchronized in all the platforms. The sales and marketing teams regularly communicated with their donors via emails and SMSes. Apart from working on marketing cloud and sales cloud, they use mobile studio extensively. The contacts, overtime, have lost the synchronization in the opt-in/opt-out status. The task is to develop a solution which would eliminate the need for the team to manually synchronize the consents in all the three portals.

## SOLUTION

The challenge of syncing consents between Marketing Cloud and Salescloud along with Marketing Cloud to Mobile Connect was welcomed by the developers at Genetrix Technology. Client team and Genetrix Technology have been working together for quite some time where we have assisted them in development of other custom solutions. We decided to build three automations for this custom solution.

01

**Syncing Marketing Cloud consents to Salescloud**

02

**Syncing Salescloud consents to Marketing Cloud**

03

**Syncing Marketing Cloud consents to Mobile Connect**

## OUTCOME

The three processes that were deployed in the marketing cloud org were aimed at keeping their subscriber data up-to-date while keeping the effort required to undertake this crucial task at a minimum. Deliverability of emails and SMSs was improved since they were delivered to donors who actually wanted to receive them. The team, can now relax and focus on other activities related to sales and marketing while these three automations developed by Genetrix Technology keep their all subscribers, all contacts and their salesforce objects updated for email and SMS consents.

The first process was built to synchronize the subscription status in the All Subscribers list in Marketing Cloud to Contacts, Leads and Accounts in Salescloud. The consents received through the standard preference center being used in marketing cloud were leveraged for this process. This ensures that any leads, contacts or accounts that have not expressed their consent in receiving emails would not be synced to Marketing Cloud.

The second automation was developed because the team uses Salescloud as their data base of records. Their team edits the records only in Salesforce and the records are then synced to Marketing Cloud. This automation would make sure that along with the syncing of record details the consents from these records are being updated in marketing cloud all subscribers list. This will not only keep the records synchronized in all the CRMs, it will also prevent any future unwanted sends to the subscribers from marketing cloud.

The third automation is aimed at the contacts that have also agreed to receive SMS communications. The consents from mobile studio are managed separately from email studio and need to be refreshed regularly as well. Consent expressed by subscribers through the preference center are therefore synchronized with the contact list in mobile studio using this automation.