



SUPPORTING
YOUR BUSINESS

GETTING MORE FROM SALESFORCE

Salesforce Marketing, Commerce, and Service Clouds offer solutions that can help you cope with the post-crisis challenges being faced. Some are little known out-of-the-box ones, others are more complex.

In this playbook Emakina shares the most interesting solutions that can help you increase the results from your ebusiness in a high speed fashion.

Keywords: Salesforce, Commerce Cloud, Marketing Cloud, Service Cloud.



Intro

Salesforce Marketing, Service and Commerce Clouds offer many features which can help you address some of the challenges you are facing post-crises.

This playbook highlights some of the more interesting solutions you can implement to help you provide personalised customer journeys.

This playbook shows possible solutions for:

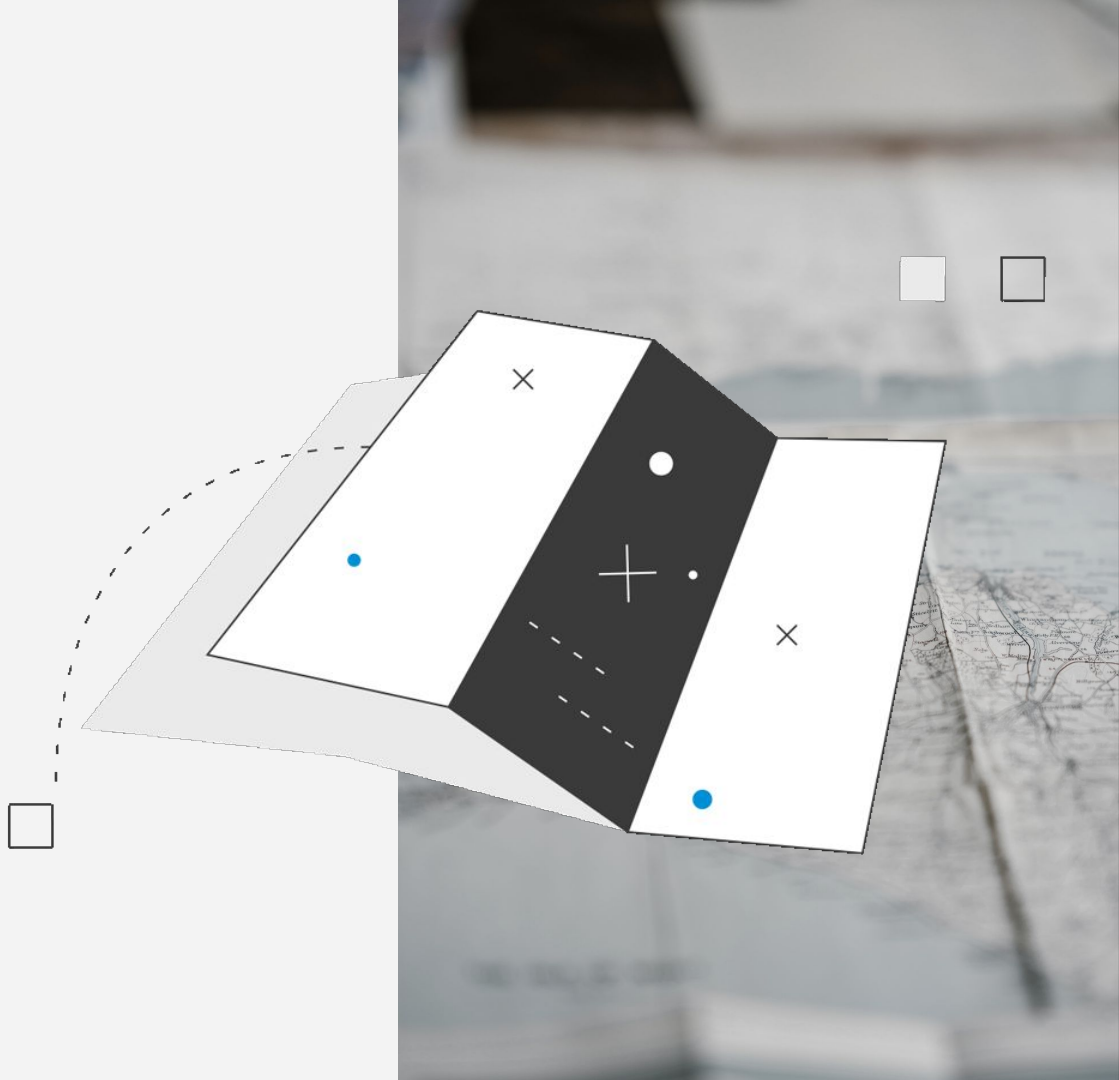
- Marketing Cloud
- Service Cloud
- Commerce Cloud
- Cross-Cloud Solutions

SALESFORCE

CROSS CLOUD SOLUTION KITS

Create personalised, seamless customer journeys that improve engagement and loyalty by implementing solutions kits that take advantage of integrations between your Salesforce Clouds.

These solution kits are guides produced by Salesforce and provide the best practices, considerations and materials needed to create these continuous experiences across your Salesforce Clouds. They are based on the most common use cases.



Abandoned Cart Solution Kit

Customers will be more carefully considering their purchases, with not all of their browsing turning into completed purchases.

The abandoned cart solution kit takes active data from Commerce Cloud, in this case customers who have products in their cart but haven't completed a purchase, and allows you to use this in Marketing Cloud to create personalised journeys to provide an incentive for them to return and make their purchase.

SALESFORCE CLOUDS

- Commerce Cloud
- Marketing Cloud Enterprise and Personalization Builder

WHY IS THIS A GREAT OPPORTUNITY

Turn some of those abandoned carts into completed purchases, learn which incentives work best for conversion, increase shopper engagement and satisfaction.

HOW TO MAKE THIS ACTIONABLE?

You'll need some support from your implementation partner to set this up as you'll need to:

- Implement the collect.js script via the Community Connector or through your Tag Manager of choice
- Set up ways to identify visitors on the website with a unique ID, e.g. from account login or via URL parameters
- Switch on the abandoned cart functionality through a Service Engagement from Salesforce Support
- Use the data that flows back to Marketing Cloud to dynamically fill email templates, trigger journeys and personalize recommendations

WORKFLOW

Commerce Cloud (Abandoned Cart)

Shopper adds items to the cart

Shopper doesn't checkout

Collect.js code monitors shopper's behavior

Marketing Cloud (Email Engagement)

Marketing Cloud listens to behavior events

Shopper is put on a journey

Engage Shopper based on their Channel Preference

Shopper clicks abandoned cart email

Click tracking is set up in email



Abandoned Browse Solution Kit

OPPORTUNITY DESCRIPTION

- Visitors browsing products on site have a high interest in the products
- Not all sessions on site end with a cart that is filled with products (abandoned cart journey), but visitors can still show interest in products
- They could abandon their browse because they are still doubting so there is the possibility to tell more about the product details
- Leverage web behaviour and combine with product recommendations based on this web behaviour

WHY IS THIS A GREAT OPPORTUNITY?

- Direct increases of sales
- Relevant moment for customer, and opportunity to catch their attention for (other) browsed products
- "Set it and forget it" (requires little maintenance)
- Gives the opportunity to provide visitor more / better information to close the deal.

HOW TO MAKE THIS ACTIONABLE?

1. Set up ways to identify visitors on the website, e.g. from account login
2. Collect browsing data on the website and send it back to your email marketing tool
3. Ensure your product catalog is up to date to display correct product information and offers
4. Create an email flow that will be triggered when a visitor browses products but no purchase is made
5. Ensure to avoid high email pressure by prioritizing higher intent journeys first, e.g. abandoned cart
6. Create ruling to re-target visitors on other channels like Google Ads, Criteo , and Social Media when they are unresponsive to emails

Order on Behalf of Solution Kit

Sometimes, customers struggle to place orders online, perhaps due to connection issues or not being able to find the product they need.

The order on behalf of solution kit allows service agents to place an order on behalf of registered customers, providing a more interactive shopping experience.

SALESFORCE CLOUDS

- Commerce Cloud
- Service Cloud

WHY IS THIS A GREAT OPPORTUNITY?

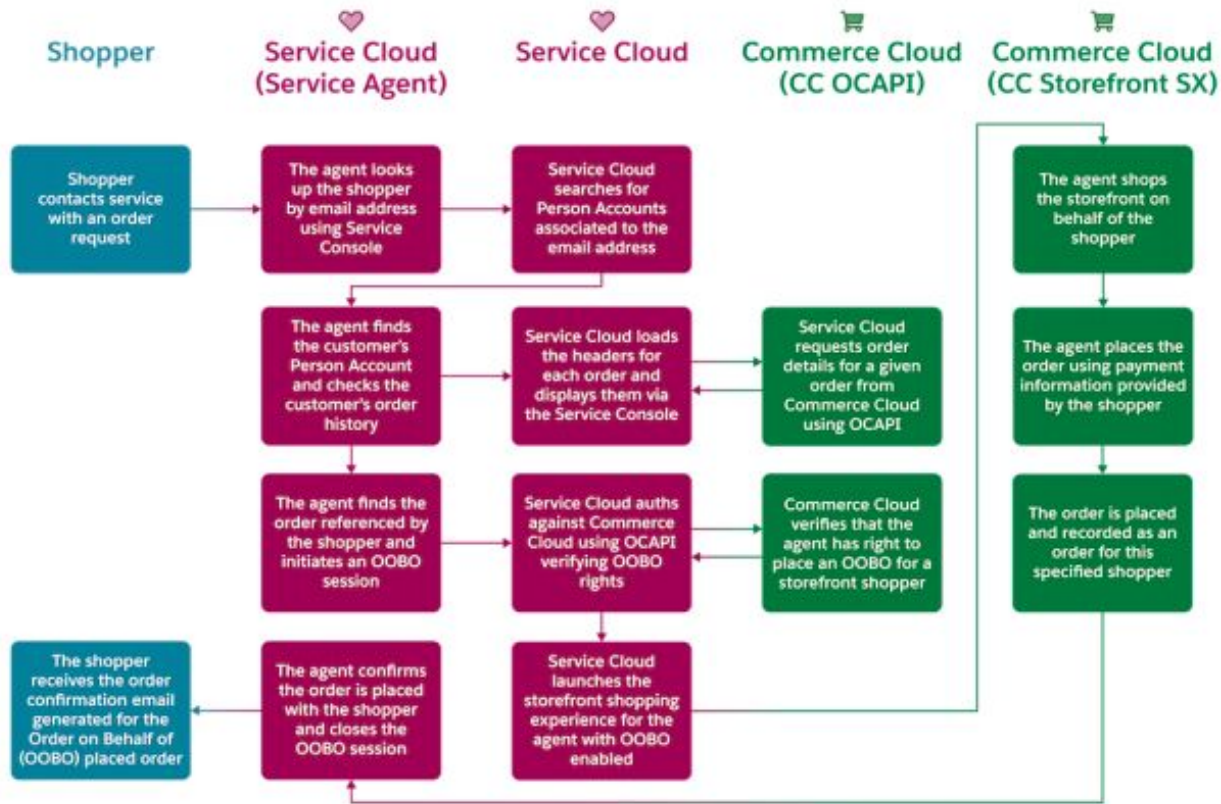
You can use your existing website for the service agents to login on behalf of your customer and place an order on your commerce site for them. This will help you to increase completed purchases and customer satisfaction in one exchange.

HOW TO MAKE THIS ACTIONABLE?

You'll need some support from your implementation partner to set this up as you'll need to:

- Implement the configurations and set up the Commerce to Service Cloud connector with developer support. This will provide a framework to connect the clouds using REST APIs to share the needed data
- Work with your development partner to configure the settings needed to enable service agents to place orders

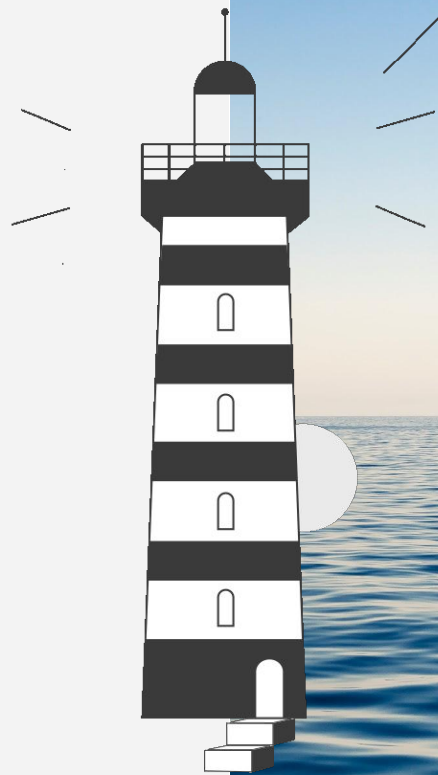
WORKFLOW



SALESFORCE

EINSTEIN

Einstein is a powerful AI tool from Salesforce available for use across Commerce, Marketing and Service Clouds using active data in the site to provide more personalised experiences to your customers. Einstein can help your merchandisers provide the best possible recommendations and results.



Einstein Send Time Optimizations

Einstein can help you determine the best time to send email messages to contacts in your marketing journeys using machine learning. Use this feature to understand when your subscriber base is most likely to open your emails and click through to the website.

This feature is enabled automatically in Marketing Cloud Corporate and Enterprise editions.

SALESFORCE CLOUDS

- Marketing Cloud

WHY IS THIS A GREAT OPPORTUNITY?

People's habits can change, based on having a new job, changing home life or new commitments. This means that send times should be reviewed regularly. With Einstein, this can be done for you, giving marketers more time to focus on content and opportunities

HOW TO MAKE THIS ACTIONABLE?

- Review your marketing journey to determine where Einstein optimisations would work well
- Add in Einstein send time optimizations to relevant parts of the journey

Einstein Email Recommendations

Einstein product recommendations lets you easily create 1:1 personalized offers to your subscribers. This feature is super flexible and allows non-technical marketers to easily configure what kind of recommendations they want to show to your audience.

This functionality is enabled by the same setup as the Abandoned Cart so no additional development is necessary.

SALESFORCE CLOUDS

- Marketing Cloud (Personalization Builder)

WHY IS THIS A GREAT OPPORTUNITY?

With Einstein recommendations you can quickly adapt to changing consumption habits by configuring ruling to stay relevant with unique recommendations for each subscriber.

HOW TO MAKE THIS ACTIONABLE?

- List what products (categories) should be highlighted and which should be excluded from recommendations. Base this on criteria such as: product margin, logistical impact
- Configure Einstein Rule Manager to instantly reflect these rules in your recommendations

Einstein Case Classification and Routing

Customer service teams are always busy, help lighten some of the load by implementing Einstein Case Classification and Routing

With this Einstein uses data from closed cases to help predict and recommend field values for new cases.

SALESFORCE CLOUDS

- Salesforce Service Cloud

WHY IS THIS A GREAT OPPORTUNITY?

Save agents time with automated field values. Einstein case routing can save the best recommendation and route the case to the right agent.

HOW TO MAKE THIS ACTIONABLE?

- Turn on case classification and determine the fields you want Einstein to predict
- Configure your predictive model (decide which cases Einstein should learn from and the fields it should predict)
- Configure what fields and case routing you'd like Einstein to do and the set the confidence level
- Once your happy with your configurations, activate the predictive model

Einstein Product Recommendations

Within Commerce Cloud, Einstein can help you provide customised product recommendations for each user based on active data and live data in the site to provide personalised recommendations.

SALESFORCE CLOUDS

- Commerce Cloud

WHY IS THIS A GREAT OPPORTUNITY?

Increase conversion for customers (and potentially average order value) by elevating the products most suited to them while they're browsing your site.

HOW TO MAKE THIS ACTIONABLE?

- Define in the current site where Einstein product recommendations could be used
 - ◆ 'You may also like'
 - ◆ 'Related products'
- Get help from your implementation partner to update and create the relevant templates where you would like to use Einstein product recommendations so that the results will show where they need to
- Create recommenders and set the rules and strategies using the configurator

Einstein Search

Provide the most relevant, personalised search results to your customers with Einstein Search. Use its features such as:

- Search dictionaries - adds keyword search data to your dictionaries for you, and helps you learn what customers are now searching for
- Search recommendations - applies algorithms to set data points to provide the most relevant, personalised search results
- Predictive sort - uses data points to sort products based on rules you've set up in the most personalised way for the customer

SALESFORCE CLOUDS

- Commerce Cloud

WHY IS THIS A GREAT OPPORTUNITY?

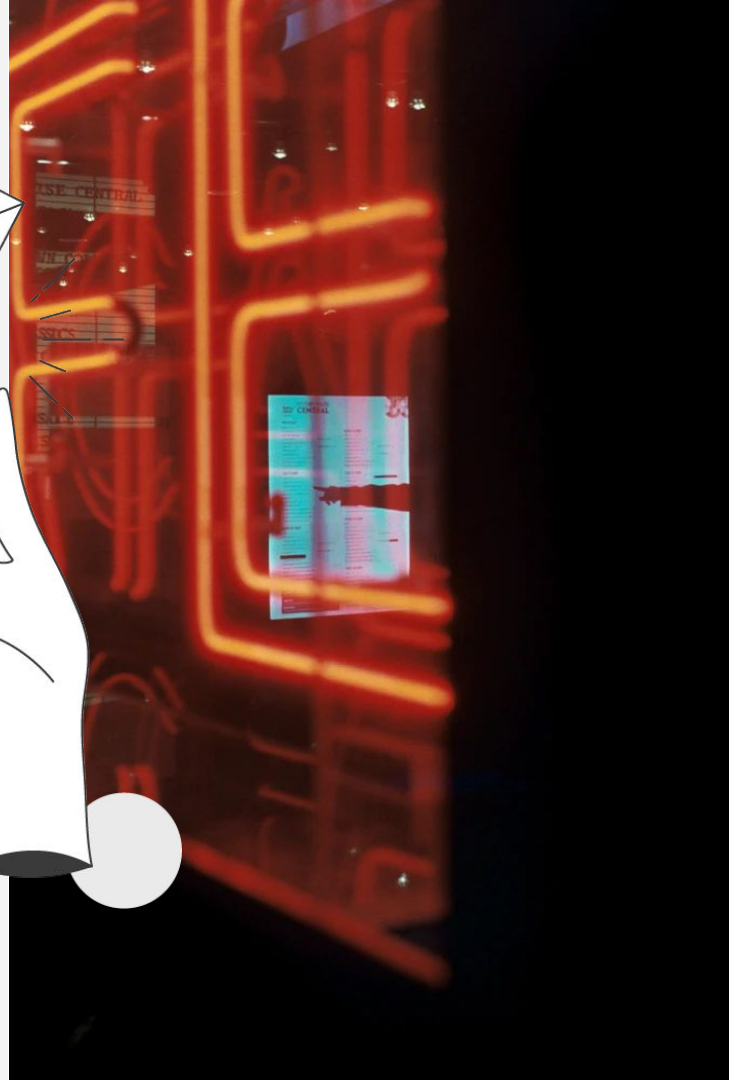
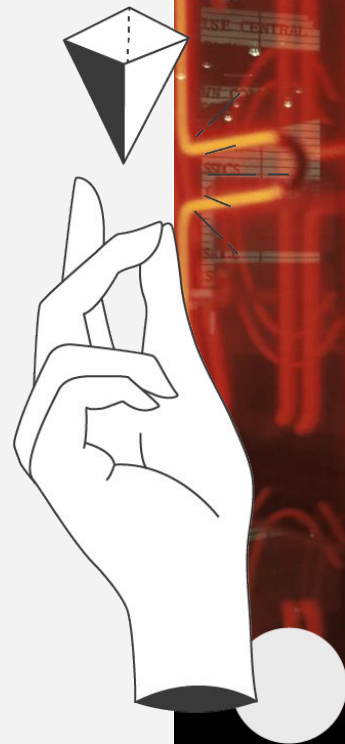
Enhance the work your merchandisers have already done in configuring sorting rules and search suggestions with Einstein to improve the shopper experience, enhancing sales and conversion by promoting the most relevant products.

HOW TO MAKE THIS ACTIONABLE?

- Make sure Einstein is enabled on your site
 - ◆ It will take some time to build up the data it needs or use it sooner by feeding it with some historical data
 - ◆ You may need some developer support for this
- Set up search dictionaries
- Enable and set up search recommendations (you'll need some developer support for this)
- Set up predictive sort by adding it as an attribute to relevant sorting rules (take into account caching considerations for performance)

PROMOTIONS AND CAMPAIGNS

Create seamless user experiences across clouds taking advantage of the powerful promotion and campaign engine within Commerce Cloud to create hyper-localised customer campaigns quickly to respond to changing situations.



Promote what customers are looking for

Coupled with campaigns and promotions make sure you can easily promote the right products, following the different buying habits customers have at this time.

Focus on:

- Products for working at home
- Products to keep the kids busy at home
- Products to stay healthy at home
- Products to have fun at home

SALESFORCE CLOUDS

- Commerce Cloud

WHY IS THIS A GREAT OPPORTUNITY?

Everyone is spending much more time at home right now. Show products that will help make that as comfortable as possible.

As an added incentive to buy now when people most need them you could set up a % off campaign restricted towards these particular products as a way to help

HOW TO MAKE THIS ACTIONABLE?

Create a manual category in Salesforce Commerce Cloud which group these products easily for use to promote throughout the site:

- Identify the products you want in this category and add them
- Add as a category to the main navigation
- Promote and link through to the category specific lister page from the homepage

Personalization across channels

Many of you will have, or, be considering using personalised campaigns and promotions to encourage your customers to buy.

Use Marketing Cloud to segment your subscriber base and send targeted campaigns. Share these segments with your advertising channels to retarget them with consistent messages and find more of your best customers with lookalike audiences. Use Commerce Cloud to conclude the journey seamlessly with a sale on your website.

SALESFORCE CLOUDS

- Commerce Cloud
- Marketing Cloud
 - ◆ Advertising Studio add-on

WHY IS THIS A GREAT OPPORTUNITY?

When personalised campaigns and promotions are managed centrally across channels, leads and customers are consistently targeted with the most relevant content. This more relevant content results in higher conversion rates and more efficient ad spend.

HOW TO MAKE THIS ACTIONABLE?

- Create an overall campaign strategy and determine how each channel (mainly ads, email and on-site) is utilized
- Configure triggers to start the right Campaign / Promotion based on source code in URL
- Create a campaign targeted at a particular customer group and link it to experiences on the site through the creation of the relevant promotion, coupon codes and customising content slots.
- Fine tune this further by adding additional qualifiers, exclusivity rules and outlining the applicable products
- Schedule the campaign to run for a set time period and even target it at traffic from specific sources

Re-stock campaigns

Popular products can go out of stock, particularly if they have an increase in popularity. Allow your customers to sign up for back in stock notifications to not lose their business.

Setting this up is a one-time effort and can run fully automated if the right data is made available to Marketing Cloud.

SALESFORCE CLOUDS

- Commerce Cloud
- Marketing Cloud

WHY IS THIS A GREAT OPPORTUNITY?

Missing revenue due to sold out products is a big waste. By providing your customers with a way to be the first to be notified when a scarce product is back in stock you provide a great service for your customers while building up your subscriber database and ensuring future revenues.

HOW TO MAKE THIS ACTIONABLE?

- Create a form in the storefront that dynamically shows on a PDP when a product is out of stock
- Determine the data requirements: email address, product sku, address, etc.
- Collect form data in Marketing Cloud
- Run a query on your product feed from Commerce Cloud in Marketing Cloud to check if products are back in stock
- Push the right subscribers into a journey to notify them automatically

Tell a friend campaigns

People love to help each other out by recommending products that they enjoy. In Marketing Cloud you can set up incentivized "tell a friend" campaigns without the need for 3rd party tools to encourage this behavior even more.

SALESFORCE CLOUDS

→ Marketing Cloud

WHY IS THIS A GREAT OPPORTUNITY?

Word of mouth and recommendations from friends and family are by far the most convincing ways to get people to buy a product. By rewarding people to recommend your brand or products you can create a win-win situation.

HOW TO MAKE THIS ACTIONABLE?

- Identify your best customers (e.g. using an RFM model) that would be most likely to want to share your brand
- Determine what the best way is to incentivize your customers, e.g. discounts, exclusive pre-sales, etc.
- Generate unique referral URLs per customer to a Cloud Page where their friends can accept the offer
- Store the accepted offer data in a Data Extension and run a query to count the amount of referrals
- Push customers into a journey that automatically sends the appropriate reward

Localization

Local stores are a key part of communities worldwide. With locally targeted campaigns you can allow your store employees to keep in touch with their local customer base.

With offline transaction data (e.g. from loyalty cards) and/or address data available in Marketing Cloud you can create hyperlocal campaigns.

SALESFORCE CLOUDS

- Marketing Cloud

WHY IS THIS A GREAT OPPORTUNITY?

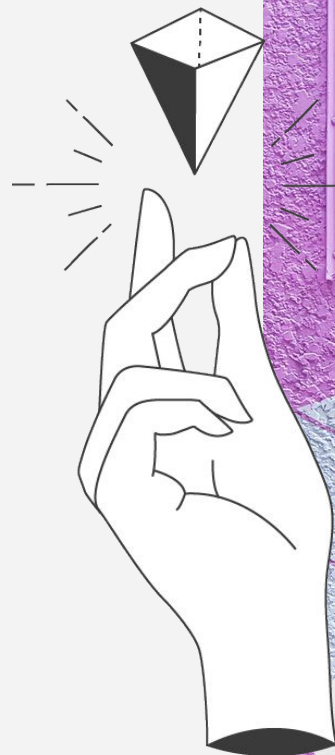
People are in need to keep in touch with their local community. By offering your store managers and franchisees a way to communicate with their local customers in a relevant and personal manner you maintain your relationship with them.

HOW TO MAKE THIS ACTIONABLE?

- Assign a "favorite store" to each subscriber based on available information, e.g. store with highest total transaction amount, postcode, engagement with local offer, etc.
- Make a form available (on a CloudPage) to store employees where they can write a personal message, save this input in a Data Extension
- Send out email campaigns with a dynamic content slot that automatically includes the message of the subscriber's favorite store

OPTIMISATIONS & ENHANCEMENTS

Making sure your site and content is optimised ensures your customers have the best experience of your site.



MORE
AWESOME
NOW

Online Gift Cards

Make gift cards purchasable online as a way for customers to spend money now on things that they'll make use of later:

- Gift cards redeemable online and instore
- To gift to friends and family for special occasions where you can't be there without the need to arrange shipping and delivery

SALESFORCE CLOUDS

- Commerce Cloud

WHY IS THIS A GREAT OPPORTUNITY?

Makes gifting easy - it's rare that splitting orders into different shipments is supported in most platforms, but with an online gift card, customers can easily purchase an online gift card that they can send to their loved ones.

With them being online, you also bypass the logistical issues attached to shipping physical gift cards.

HOW TO MAKE THIS ACTIONABLE?

If you don't have an existing tool for this we recommend contacting your implementation partner who can help with implementing the right tool for you.

Page Designer

Page designer allows you to quickly create new and appropriate content pages within your Commerce Cloud site will help you stay on top of providing the best experience to your customers.

SALESFORCE CLOUDS

→ Commerce Cloud

WHY IS THIS A GREAT OPPORTUNITY?

Page Designer gives content managers and editors the flexibility to create their own content pages within the site using a series of components without developer support (once the components have been set up).

HOW TO MAKE THIS ACTIONABLE?

- If you aren't yet using Page Designer we can help. We've already implemented Page Designer for a number of our Commerce Cloud clients and can work with you to define and create the components you need

Restructuring your store pages

Consumer behaviour has changed radically since the coronavirus outbreak.

E.g. opening hours and services were fairly well-known and stable, now there is a lot of confusion

Restructuring your content here to not only provide the most relevant and up to date information to your customers but also linking to categories online which they may be interested in.

SALESFORCE CLOUDS

→ [Commerce Cloud](#)

WHY IS THIS A GREAT OPPORTUNITY?

There might be specific products, categories available at their store of interest that are available online, provide links to those categories to help your customers find what they need online also.

Start planning for when stores will open again, perhaps there will be reduced hours, or appointment only windows to limit the people in store, prepare now for how you can manage this on your store pages - a simple form they can fill in, or a booking form perhaps. Preparing these now means that you can act quickly when stores open.

HOW TO MAKE THIS ACTIONABLE?

- Review and update the content within your store pages to clearly communicate that the store is temporarily closed or what the reduced opening hours are
- Plan how you can integrate a simple appointment form for if you need to use this approach when stores re-open

Optimise your content and A/B Test

Customer shopping behaviour can change. Make sure your content is optimised using Commerce Clouds inbuilt capabilities to run A/B tests.

SALESFORCE CLOUDS

→ Commerce Cloud

WHY IS THIS A GREAT OPPORTUNITY?

Give your customers the best experience of your site by ensuring they view your content in the most optimal way.

Use A/B tests to experiment and test your content

HOW TO MAKE THIS ACTIONABLE?

- Create, manage and view the results of A/B tests directly within the business manager
- In the business manager you can assign promotions and slot content to an A/B test - use common qualifiers such as source code or customer groups to target them
- Create test segments to configure unique experiences for your customers and define triggers that determine whether someone becomes a participant in the test

Manage the content of resource files

Being able to make quick updates to your site to keep your users informed of key information such as delivery times has never been more important.

Emakina has developed a custom solution for Commerce Cloud customers which enables content managers and editors to translate and manage the content of resource files in the business manager.

This means that you can make quick changes to the content of those resources without needing a developer to do this work for you, significantly reducing the lead time on these changes.

SALESFORCE CLOUDS

- Commerce Cloud

WHY IS THIS A GREAT OPPORTUNITY?

Make rapid changes to text on your site without needing to wait for a developer to make it for you. Giving you the flexibility to tweak translations and language to give the best experience to your customers.

HOW TO MAKE THIS ACTIONABLE?

Get in touch with us to find out how we can add this to your Commerce Cloud site

Fixed channel menu

Customers want to be able to contact you as easily as possible. By adding a fixed channel menu to your site, they don't need to find your contact page to get in touch. They can also contact you in the way which best suits their circumstances.

SALESFORCE CLOUDS

→ Service Cloud

WHY IS THIS A GREAT OPPORTUNITY?

Allow customers to easily contact you through the channel that is easiest for them by setting up the fixed channel menu via a code snippet on your site.

Allows service agents to still be able to respond from the service console in their usual way and can be easily placed in high-traffic areas of your site so it's easily accessible.

HOW TO MAKE THIS ACTIONABLE?

- Create a channel menu deployment and add the channels you'd like to appear in it
- Set the branding of the menu so it fits the branding of your site
- Add the channel menu snippet to place the button and menu on your website

Create an outlet store

You may have surplus stock that you are unable to sell through your normal site.

We have previously introduced outlet areas to Commerce Cloud for several clients:

- This can be implemented as a separate section of the normal site, potentially with different styling.
- It is also an option to make the outlet store hidden, and only accessible to specific users by means of logging in.

SALESFORCE CLOUDS

- Commerce Cloud

WHY IS THIS A GREAT OPPORTUNITY?

- Sell surplus stock at lower prices, without affecting the perception of your brand
- For hidden outlet stores: control who has access to outlet stock and prices with customer lists and a login screen
- Make use of your existing site's checkout and fulfillment processes

HOW TO MAKE THIS ACTIONABLE?

Get in touch with us to find out how we can help you implement this on your Commerce Cloud site



EMAKINA

Even now - especially now - there are a lot of opportunities to be found. Some are simple improvements that should have been in place, others can be seen as low hanging fruit, but most opportunities need a change in the way you think about business as usual.

Whatever you'll start doing, **you will need to act fast**, and availability of people and plans is critical. We made our most experienced people available to help you achieve maximum results in this complex time.

This playbook is part of a growing series of publications especially created to help e-businesses get through Covid-19.

WE'RE HERE TO SUPPORT.

LET'S GET STARTED!
CONTACT US.

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