



# Salesforce Marketing Cloud Optimization

Collaborating with university staff to bring efficiency into a legacy instance



## CHALLENGES

- **Escalating Costs:** The existing SFMC instance was incurring high contact overage costs due to inefficient subscriber management and segmentation.
- **Compliance Risk:** Lack of robust subscriber opt-in auditing processes posed a significant risk of non-compliance with data privacy regulations and potential legal repercussions.
- **Outdated Preference Center:** The existing preference center was outdated and did not provide users with granular control over their communication preferences, leading to disengagement and unsubscribes.
- **Business Unit Silos:** Multiple business units within the school were using SFMC independently, leading to data silos, inconsistent messaging, and missed opportunities for collaboration.
- **Sales & Marketing Disconnect:** The integration between SFMC and Sales Cloud was suboptimal, resulting in fragmented customer data and hindering lead nurturing and conversion efforts.

## SOLUTION

- **SFMC Optimization:** Conducted a thorough audit of the SFMC instance and implemented best practices for data management, segmentation, and automation to reduce costs and improve efficiency. Helped clean up upto 30% of contacts thus mitigating overage costs.
- **Compliance Audit and Remediation:** recommended a comprehensive subscriber opt-in audit process and remediated any compliance gaps to mitigate risk and ensure adherence to data privacy regulations.
- **Preference Center Redesign:** Working on designing a new preference center that empowers users to manage their communication preferences with greater granularity, which will lead to increased engagement and satisfaction.
- **Business Unit Alignment:** Developed a strategic framework for aligning business units within SFMC, fostering collaboration, and ensuring consistent messaging across the school departments.
- **Sales Cloud Integration:** Optimized the integration between SFMC and Sales Cloud to create a unified view of the customer journey and facilitate seamless lead handoff and nurturing.