ADOBE CAMPAIGN INTEGRATION WITH SALESFORCE CRM

Client: Pearl Academy

ABOUT:

Pearl Academy is a one of the premium institutes in India that provides graduation &post-graduation courses to the students in the area of Fashion, Designing, etc. They have their presence in Delhi, Mumbai, Noida and Jaipur. Also they are one of the educational institutes to opt-in for Adobe campaign standard to target their audience/students through digital channel for the graduation & post graduation courses.

CHALLENGES:

Pearl Academy does have a dedicated team which is responsible for executing digital marketing activities, however they were new to marketing automation campaigns, hence they were lacking in the skills, strategy and discipline which is required for making successful campaigns on Adobe platform. For initial days, we analyzed the practices which Pearl Academy was following for the campaign management. Below are the few challenges what they were facing before our guidance was provided:

- High spam score
- Reporting
- Campaign Management
- HTML Development
- Data Cleansing and hygiene

To overcome the challenges and to make effective campaign and responses, we designed solutions to automate the overall process to carry the data from SalesForce CRM and carry back to Adobe Campaign Standard. Below are the steps which we followed in this project:

PROJECTOVERVIEW:

- **SalesForce CRM Integration with Adobe Campaign Standard**
  We successfully completed the critical integration between Adobe campaign standard and SalesForce CRM as per the client's requirement; proudly we are the first to accomplish this on Adobe Campaign Standard in India region.
  Data was residing on SFDC CRM and campaign carried on ACS. This project in a nut-shell required integrating SFDC CRM & Adobe campaign by creating an automated process to transfer data that resides in SFDC CRM to be flowing into Adobe campaign and post campaign launch data from Adobe campaign to be flowing back to SFDC CRM.
  To make the data flow from both the platforms we needed to make the channel open and secured, so that post campaign data should post to SFDC CRM once the campaign is successful. We established the path between both applications using below methods:

  - JWT
  - ACCESSTOKEN
  - PRIVATE KEY and PUBLIC CERTIFICATE
  - ADOBEI/O

- **Scoring Model for ranking the audience**
  Scoring module is a criteria that is designed for all the emails and SMS campaigns which were targeted to the audiences based on the open rates and click rates (emails and sms).
  We designed and implemented a work flow which will gather all data/Informationfrompast45 days of all profiles/Target who have received an Email/SMS. And then this workflow will start scoring them based on the rules provided by Pearl Academy. Once the Scoring Workflow is finished scoring all the Profiles, it will trigger the second workflow which will update the Leads and Opportunity Table with the Updated Scoring Status. Once the Scoring Status is updated to Leads and Opportunity table, the data is available for SFDC CRM to pick through an API call. SFDC CRM will make a Get API call and copy all updated data from Leads and Opportunity table.

- **Schedule for the workflows**
  - Daily10PM –Lead Scoring Model Workflow Triggers and performs scoring of Profiles/ Targets
  - Daily10PM –Campaign Data is made available for SFDC CRM to Pickup
  - Daily10PM –Lead Scoring data is Updated in Leads & Opportunity table and it is made available for SFDC to pickup
  - Daily11PM –SFDC will make a Get API call to Pick up Lead scoring data from ACS Leads and opportunity table
  - Daily1 AM–SFDC will make an Post API call and send all the Updated data to ACS Leads and Opportunity table
  - Daily3 AM–ACS will run a workflow to transfer the Leads and Opportunity data to Profiles and make it available for Campaigns

ADD ONS:

- **Training for HTML creative development:**
  The creative which were developed by the client was not following the best practice like how the marketing email should look. We trained on the factors and standards that need to be followed to reduce the spam score & high inbox deliverability of the email creative.

  CONCLUSION:

  - After all solutions we designed and implemented on ACS, now the campaigns have high deliverability, good response from the audience I.e. open rate, click rate etc.