Project Title:

Customer Journey Mapping for Enhanced Customer Experience

Industry: Sales, Service, and Marketing
Project Type: B2B/B2C Salesforce Customer Experience and Analytics Implementation
Target Users: Sales Representatives, Marketing Teams, Customer Service Agents, Customer Experience Managers

Problem Statement:

Organizations often struggle to get a unified view of their customer interactions across multiple touchpoints. Without a 360-degree view, it is challenging to understand customer decision paths, identify pain points, and optimize the engagement strategy, resulting in lost sales, lower customer satisfaction, and missed upsell opportunities.

To solve this, the company aims to implement a Salesforce-based Customer Journey Mapping solution that:

- Captures and consolidates customer interactions across sales, service, and marketing channels

- Visualizes the journey stages customers progress through

- Analyzes behaviors to identify drop-offs or pain points

- Enables personalized engagement based on journey insights

- Provides actionable dashboards for continuous improvement

Use of Salesforce:

- Data Integration and Modeling: Aggregate customer data from Salesforce Sales Cloud (Opportunities, Leads), Service Cloud (Cases, Knowledge), Marketing Cloud (Campaigns, Email Engagement), and external touchpoints with custom objects and relationships.

- Journey Stage Tracking: Use custom fields or picklists to classify customer records by journey stage (Awareness, Consideration, Purchase, Service, Loyalty).

- Automation: Use Salesforce Flow and Process Builder to automate updating journey stages based on customer actions (e.g., opportunity created, case opened, campaign response).

- Visualization and Analytics: Build custom reports and dashboards in Salesforce to visualize flow metrics between stages, conversion rates, and customer engagement scores. Utilize Tableau CRM for advanced, AI-driven analytics and insights.

- Real-time Notifications: Use Salesforce notifications and email alerts to prompt sales/service teams when key journey events occur (e.g., high churn risk identified).

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Use Cases:

1. **Interaction Capture:**
   Track and record customer interactions across multiple channels automatically into Salesforce.

2. **Journey Stage Updates:**
   Automatically update customer's journey status based on qualified actions or responses.

3. **Performance Insights:**
   Generate dashboards showing customer drop-off points, campaign effectiveness, and service feedback trends.

4. **Personalized Engagement:**
   Trigger marketing or service automation tailored to the customer's current journey stage.

5. **Executive Reporting:**
   Provide leadership with real-time insights on customer journey health and bottlenecks to make data-driven improvements.

■ Expected Outcomes:

- Improved understanding of customer buying behavior and decision-making processes
- Enhanced customer experience through timely, relevant engagement
- Higher conversion rates and reduced drop-offs across journey stages
- Increased customer retention and lifetime value
- Data-driven insights for continuous strategy optimization