



SFMC

with me

Brief 002

WealthMax's Event Journey

Overview

WealthMax, a leading wealth management firm, seeks to orchestrate an unforgettable end-of-year event for their esteemed clients.

They require a savvy marketer to help them utilize Salesforce Marketing Cloud's capabilities to craft personalized event invitations, manage RSVP responses, and automate follow-up communications seamlessly.

Background

WealthMax is bustling with excitement as they gear up for their annual end-of-year extravaganza. They plan to celebrate their cherished clients and express heartfelt gratitude for their unwavering trust and support.

The planning committee, led by the dynamic Marketing Director, Emily Grace, is on a mission to ensure this year's event surpasses all expectations. Emily, with her keen eye for detail, understands the importance of every customer touchpoint, and is focused on crafting a memorable experience right from the beginning.

Emily plans to use their instance of Salesforce Marketing Cloud to deliver timely and personalised content at scale, and to automate the Invitation and RSVP process for their sales team. However the Email Marketing Specialist is on holidays, and Emily needs someone to help her bring this vision to life!

Requirements

- 1.Design a series of event invitation emails using Salesforce Marketing Cloud. See list of deliverables below.
- 2.Personalize the activity based on the sample data provided.
- 3.RSVP responses must be managed automatically.
 - a.Upon receiving a "YES" RSVP, trigger an immediate confirmation email with event instructions.
 - b.For clients who RSVP "NO," send a gracious acknowledgment email expressing our regret at their absence.
- 4.Include a reminder email for clients who haven't RSVPed within 3 days of receiving the invitation.

Acceptance Criteria

- 1.No manual input required from the Sales or Marketing teams to capture or manage RSVPs.
- 2.RSVP confirmation emails are received within 5 minutes.
- 3.RSVP information is portable so that it can be extracted before the event.
- 4.RSVP activity focuses on user experience and is as seamless as possible

Additional Information

List of Deliverables:

- 4 Emails:
 - 1 Invitation email
 - 1 Reminder email
 - 1 Accept confirmation email
 - 1 Decline confirmation email
- 1 Landing Page to capture event RSVP

Emily Grace has asked that we don't spent too long on the creative design of the deliverables, as she has a team of designers and markers on hand to insert all of the event details and make the emails and landing pages look great, however she has asked that we consider this when designing our solution.