Finance of America Reverse (FAR)

Foundational Blueprint (BRD)
Business Requirements Document
Salesforce Marketing Cloud
Version: 4.0

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FAR's Foundational Blueprint BRD

Salesforce Marketing Cloud

Version: 4.0

Version	Changes made	Date	Reviewer name
1.0	Initial Draft	26-May-2023	
2.0	Added details from Workbook	20-June-2023	
3.0	Updated details upon FAR Team confirmation	05-July-2023	
4.0	Added SSL, Lead Management, Data Model, Unsubscribe	14-July-2023	

PROJECT TEAM:

Name	Role	Team

Table of Content

Business Objective

The purpose of this document is to define the fundamental building blocks based on which the Salesforce Marketing Cloud (SFMC) platform is configured for FAR.

- FAR team would like to migrate from existing ESP to Salesforce marketing cloud.
- Implement email marketing to reach out to their customers.
- Improve customer outreach by using Text (SMS) channel.
- Leverage cross channel journeys to target their customers across channels.
- FAR would want to present everyone with the right recommendations, messages and content, rather than deliver a uniform experience on their website.
- FAR's target is to improve their conversion rate.

This document mainly lists the following fundamental building blocks.

- User Access Management
- Sender Authentication Package (SAP)
- Business Units
- Reply Mail Management
- Send Classification
- Sender Profile
- Delivery Profile
- Mobile Connect
- Folder Structure
- Lead Management
- Data Model
- Unsubscribe

These fundamental building blocks are critical from implementation program perspective, as these define the basic structure of the marketing platform.

System Requirement Details

2.1 User Access Managements

(Also explained in Technical Design Document Content Section 4.5)

SFMC has multiple studios and builders that various functions at FAR would need access. These security settings define what a marketer, admin or an IT personnel can use to successfully do their job roles. The various roles were discussed and have been outlined below along with the access levels.

These settings will help FAR team to be compliant with their internal audit and govern what individual roles can operate in salesforce marketing cloud.

Based on FAR's information on SFMC Implementation Workbook, specified roles will be provided for FAR's users:

Username	First Name	Last Name	Title	User Role(s)
jthangasamy@aag.com	John	Thangasamy	Architect	Administrator
vkotha@aag.com	Ashutosh	Kotha	SF Developer	Administrator
jake.pniewski@financeofamerica.com	Jake	Pniewski	Director, CRM	Marketing Cloud Channel Manager, Email Studio Administrator

				Marketing Cloud Channel Manager, Email Studio Administrator
tony.groth@financeofamerica.com	Tony	Groth	CRM Specialist	Marketing Cloud Channel Manager, Email Studio Administrator
jorden.beale@financeofamerica.com	Jorden	Beale	CRM Specialist	Marketing Cloud Channel Manager, Email Studio Administrator
kfoster@aag.com	Kat	Foster	BA, MOPS	Administrator
frenteria@aag.com	Faith	Renteria	MOPS Associate	Administrator
catchison@aag.com	Christine	Atchison	VP Acquisition & Operations	Administrator
mcooley@aag.com	Mark	Cooley	Director, Sales Systems and Performance	Marketing Cloud Viewer

2.2 Sender Authentication Package (SAP) & SSL

(Also explained in Technical Design Document Content Section 4.18 & 4.19)

Sender Authentication Package (SAP) is a Marketing Cloud branding tool. SAP defines the branding element to your marketing communications along with the required security for marketing communications sent out from marketing cloud platform.

SAP Features

Account Branding - Marketing Cloud brands your account with your chosen authenticated custom domain. This feature modifies view-as-a-webpage, link and image wrapping, and removes all references to Marketing Cloud in favor of your custom authenticated domain.

Private Domain for Email sending - This feature assigns a domain used to send email. This domain acts as the From address for your email sends

Custom Domain for CloudPages - This feature includes a private domain for CloudPages.

Dedicated IP Address - This feature assigns a unique IP address to your account. All email messages sent from your account from Marketing Cloud use this IP address. This IP address represents most of your sending reputation.

Reply Mail Management - This feature controls the replies you receive from your subscribers. You can assign filters for out-of-office messages and manual unsubscribe requests.

Business Unit	Private domains	Sender Email Address
Reverse	learn.aag.com	contactus@learn.aag.com

SSL (Secure Socket Layer) allows sensitive information such as Personal Identifiable Information (PII) Data, social security numbers and login credentials to be transmitted securely. SSL helps to secure domains associated with Marketing Cloud and any custom domains you use

for Marketing Cloud activities. Specifically, you can use SSL certificates to help secure domains associated with these Marketing Cloud functionalities.

- ➢ CloudPages
- ➢ Email tracking links
- ➢ Email view-as-a-web-page links
- ➢ Content Builder content

SSL SKUs that will be used to secure SAP domain are:

cloud.<custom domain>.*com*	**cloud** subdomains serve pages from the CloudPages landing pages product
click.<custom domain>.*com*	**click** subdomains are used to generate subscriber-specific click-tracking URLs
view.<custom domain>.*com*	**view** subdomains are used to generate 'View in Browser' links
image.<custom domain>.*com*	**image** subdomains serve images and related assets stored in Content Builder

2.3 Business Unit

(Also explained in Technical Design Document Content Section 4.4)

Business Units in Marketing Cloud are separate workspaces within an organization's Marketing Cloud account. It allows different team members or departments within the same organization to manage their data and marketing functions independently.
Business units control access to information and sharing of information in Marketing Cloud
Business Units are created in a hierarchy.

The top of the hierarchy is called the Parent Account and child account created under the parent account are called business units/child Account.

FAR has multiple business lines in their organization. Their vision is to consolidate marketing platforms into one technology stack in the future. Keeping this and other considerations, the below structure has been laid out for FAR for scaling up.

- **Reverse BU** – This BU would be managed by the Reverse marketing team. There would be specific information (Branding, Data, structure) related to this business.
- **Sandbox BU** – This would be the playground for any future release for the FAR marketing team.
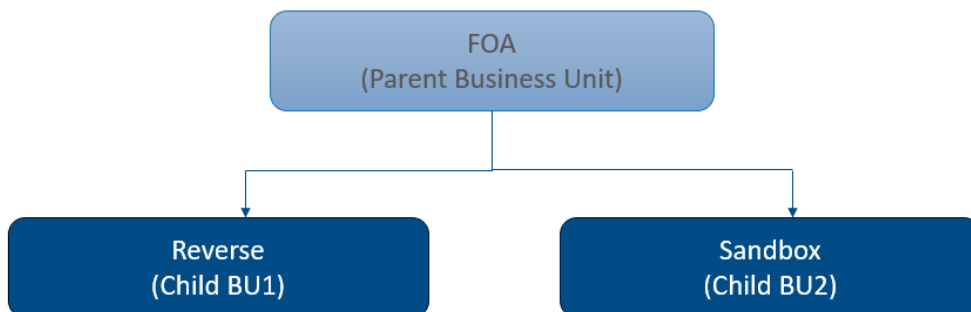
BU Name	Time Zone	Email Display Name	Email Address	Physical Address	Unsubscribe Settings
FOA	**GMT**	Finance of America	contactus@learn.aag.com	8023 East 63rd Place, Ste 700, Tulsa OK 74133	**BU LEVEL**
Reverse	**GMT**	AAG	contactus@learn.aag.com	8023 East 63rd Place, Ste 700, Tulsa OK 74133	**BU LEVEL**
Sandbox	**GMT**	AAG	contactus@learn.aag.com	8023 East 63rd Place, Ste 700, Tulsa OK 74133	**BU LEVEL**

2.4 Reply Mail Management

(Also explained in Technical Design Document Content Section 4.7)

There are multiple ways by which a prospect/customer can unsubscribe from marketing communications. FAR team receives un-subscription requests via email. This was being handled manually in the past but would be automated going ahead. This would help FAR to be compliant from the regulatory standpoint and respect customer preferences.

Reply Mail Management (RMM) is a feature of Marketing Cloud that is available for each FAR Business Unit on provision of a Sender Authentication Package.

RMM automatically manages replies, including replies from autoresponders, and leave or unsubscribe requests received in response to your emails. When a subscriber manually replies to the address or when the subscriber's account automatically replies, the email message goes to the Reply-To address FAR created.

There are multiple ways by which a prospect or customer can unsubscribe from marketing communications. FAR team receives un-subscription requests via email. This was being handled manually in the past but would be automated going ahead. This would help FAR to be compliant from the regulatory perspective and respect their customer preferences.

BU Name	Delete Auto-replies & out of office replies	Automated response email	Routing Address for Remaining Replies	Unsubscribe Manual Requests (Yes/No)
Reverse	Yes	No	noreply@aag.com	Yes

2.5 Send Classification

(Also explained in Technical Design Document Content Section 4.9)

- Email is the primary channel for FAR marketing team. Along with marketing communications FAR team plans to send out transactional emails from SFMC in the future.
- Emails sent out would need to have FAR branding for maintaining consistency for all communications sent out from marketing automation platform. This branding and domain setup is managed in sender and delivery profiles.
- Send classifications in Marketing Cloud Setup lets admins define parameters for an email job in a central location. The account can reuse those parameters for multiple email send definitions. Send classifications include sender profile, delivery profile and CAN-SPAM. Select a send classification, together with content information and audience information, when you define a message send definition by creating a message interaction.

Business Unit	Send Classification	Sender Profile	Delivery Profile
Reverse	AAG Transactional	AAG	AAG
Reverse	AAG Commercial	AAG	AAG

2.6 Sender Profile

(Also explained in Technical Design Document Content Section 4.9)

A sender profile within Marketing Cloud Setup specifies the 'From' information for a send in a central location. Marketing Cloud Email reuses that information across multiple sends without requiring selection each time. The sender profile contains the name and address that the message appears to be from in the subscriber's email client. The Details of the sender profiles are documented in the below table for various BU.

Business Unit	Sender Name (From Name)	Sender Email Address (From Address)	Reply-to Email
Reverse	AAG	noreply@aag.com	noreply@aag.com
Reverse	AAG	contactus@learn.aag.com	contactus@learn.aag.com

2.7 Delivery Profile

(Also explained in Technical Design Document Content Section 4.9)

A delivery profile within Marketing Cloud Setup specifies the delivery information for a message in a central location. Marketing Cloud reuses the information, across multiple sends, without requiring selection of the information each time.

Business Unit	Delivery Profile	Header	Footer
Reverse	AAG	Default	Default

2.8 Mobile Connect

(Also explained in Technical Design Document Content Section 4.20)

SMS being one of the most effective marketing channels, FAR would want to leverage this channel going ahead to improve their customer outreach. FAR plans to send out SMS to their prospects and customers during their entire purchase cycle.

FAR would also want to setup cross channel journeys that can be more effective and efficient in driving traffic to their campaigns.

With Mobile Connect, you can easily create SMS campaigns using prebuilt templates and then personalize those messages using your customer data.

Dependency	Details	Example	FAR Response
Code-level FROM Name	Set the mobile-code level FROM name that the specific long/short code is assigned against	FAR	AAG
Send Blackout Period*	Choose the time period you do not want customers to receive SMS messages	21:00 – 7:00 GMT	
HELP Keywords	HELP keywords allow people sending messages to or receiving messages from the account to request	HELP	HELP

	assistance in Mobile Connect. For an example response to a HELP keyword, text HELP to88769		
STOP Keywords	The STOP keyword will be your Unsubscribe request in your SMS. Mobile Connect automatically recognizes some keywords as STOP keywords: STOP, QUIT, CANCEL, END, and UNSUBSCRIBE, and custom keywords can be decided	STOP	Stop, quit, cancel, end, unsubscribe, unsub, opt out, optout
Headers and Footers	If you have templates for Header and Footer text, please provide these		FAR Team will setup
Expected Monthly Volume	Please confirm expected monthly volume of SMS messages to be sent to customers	100k a month	100k a month
SMS Message Purposes	What will the SMS messages primarily be purposed for?	Marketing/Promotional	Following up with existing database to help them through

			the loan process
SMS Regions	What regions/geographies will your SMS messages be sent to?	UK, France, Germany, Switzerland, Portugal etc.	US
LongCode/ShortCode requirements	Do you require a long code or short code? NOTE: Short Code is provisioned only for the US	Short code	Short Code

2.9 Folder Structure

Security is the most imperative aspect for FAR, folders in marketing automation can drive tight security with respect to data and content management.

Folders are an SFMC related feature that house marketing assets such as emails, landing pages and forms. It is important to set up and adhere to a folder structure from the start to ensure SFMC account and assets are organized in a logical way for business.

Local Folder: Folder that is accessible only to the respected business unit.

Shared Folder: Folder which is shared with other business unit.

Business Unit	Local Folder				Shared Folder		
	Parent Folder	Child Folder1	Child Folder2	Child Folder3	Child Folder1	Child Folder2	Child Folder3
Reverse	Global	Campaign Name	Email	Images			
			SMS				

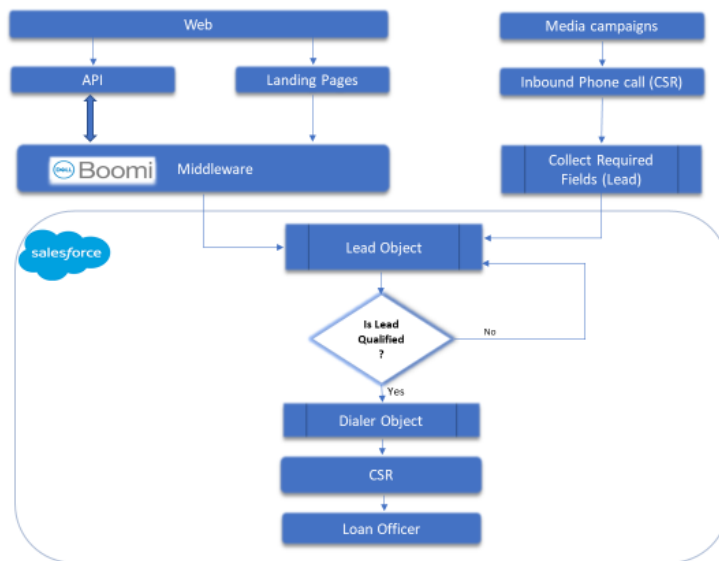**Below is a sample calendar year-based folder structure (*recommended*):**

Calendar Year Based Folder Structure:

Each calendar year will have folder structure.

The Root folder will be named 2023. The folder tree has 5 levels under the root folder.

⇒ Level 1-Region
⇒ Level 2-Sub Region
⇒ Level 3- Quarter
⇒ Level 4-Product Category
⇒ Level 5-SFMC Component

2.10 Lead Management

Leads are generated via Web (Form & API Post), Media and Inbound Calls:

- ✓ Once leads are captured, they are determined by a qualification calculator (kind of like the basic calculations of the information that is present at that time) if they are Marketing Qualified Lead (MQL) or non-MQL in SFDC. The leads cardinality is of 1 to many (Borrower, Co-Borrower and Caregiver).
- ✓ Once this data is captured it is transferred to Salesforce and an automated process triggers a call (within 7 seconds) to the customer for the enquiry
- ✓ Main point of contact for customer is first CSR (Customer service Rep) and then once lead is qualified the case is handled by Loan Officer.
- ✓ Un-subscription is handled through Web form page and then gets updated in SFDC.

2.11 Data Model

*(Also explained in Technical Design Document Content Section 6)*

Marketing cloud follows two principal data models to organize, automate and scale the data for emails sends and for any other marketing automation efforts.

1. Subscriber List (Lists)
2. Data Extension (DE)

In this engagement, Data Extensions are used as it has advantages over lists. ([To know more](#)) And also, since SFMC will be integrated into Salesforce FSC, data can be synced only via Synchronized Data Extensions.

Information about contacts is stored in a Data Extension (DE). A data extension is simply a table with fields of data about your contacts.

As a part of data modelling two master tables (Master_Lead_DE and Master_Account_DE) has been created, which will be synced on an hourly basis from the synchronized objects.
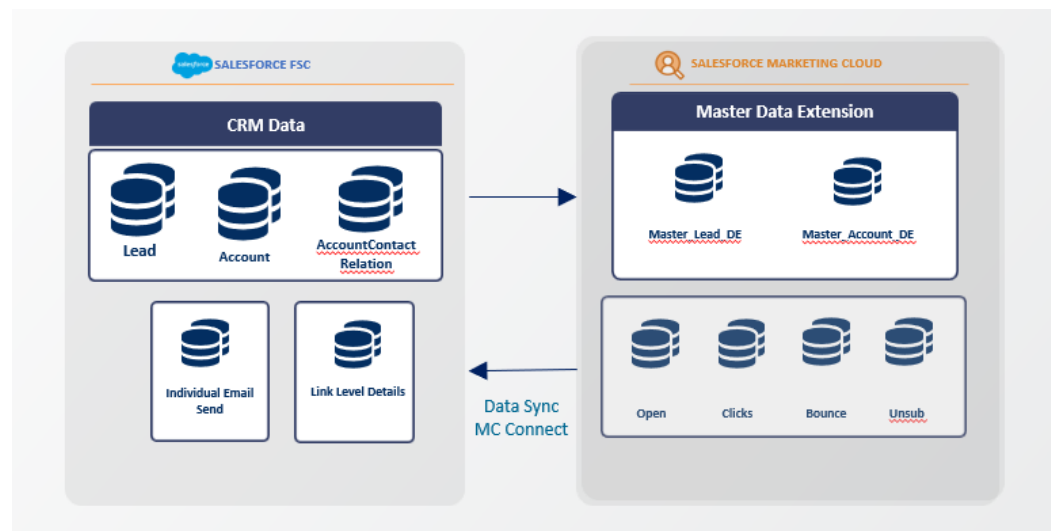
- Master data extension is a data extension that contains fields from Synchronized Data Extensions along with a list of all your subscribers and commonly used data fields like Last sent date, last open date, last click date etc.
- The idea is to be able to quickly and accurately filter your subscriber list based on the status and engagement data.
- As the data is constantly updated in this data extension, the engagement data will also be constantly updated.

Master_ Lead_DE:

- This data extension has been set up to filter the leads from the Lead object.
- This table will also hold the engagement data from SFMC (via DataViews).

Account_Master_DE:

- This data extension has been created adding fields Account and AccountContactRelation object.
- This table will also hold the engagement data from SFMC (via DataViews).

Objects to be synced into SFMC are:

1. Lead
2. Account
3. Campaign
4. CampaignMember
5. CustomerServiceEfficiency__c
6. DialerPost__c
7. Marketing_Campaign_Tracking__c
8. Opportunity
9. Qualification_Transaction__c
10. Task
11. AccountContactRelation
12. IndividualEmailResult__c

2.12 Unsubscribe Process

(Also explained in Technical Design Document Content Section 4.3.2)

The first time a message is sent through Marketing Cloud Connect to a contact or lead that recipient is added to the "All Subscribers" list in Marketing Cloud (This list is used to manage customer Subscription status on account level).

However, once a customer unsubscribes the status doesn't synchronize in the Sales or Service Cloud automatically, to achieve this we leverage custom Unsubscribe Cloudpage developed in Marketing Cloud. Which in turn helps us push preference data as well in Financial Service Cloud (FSC).
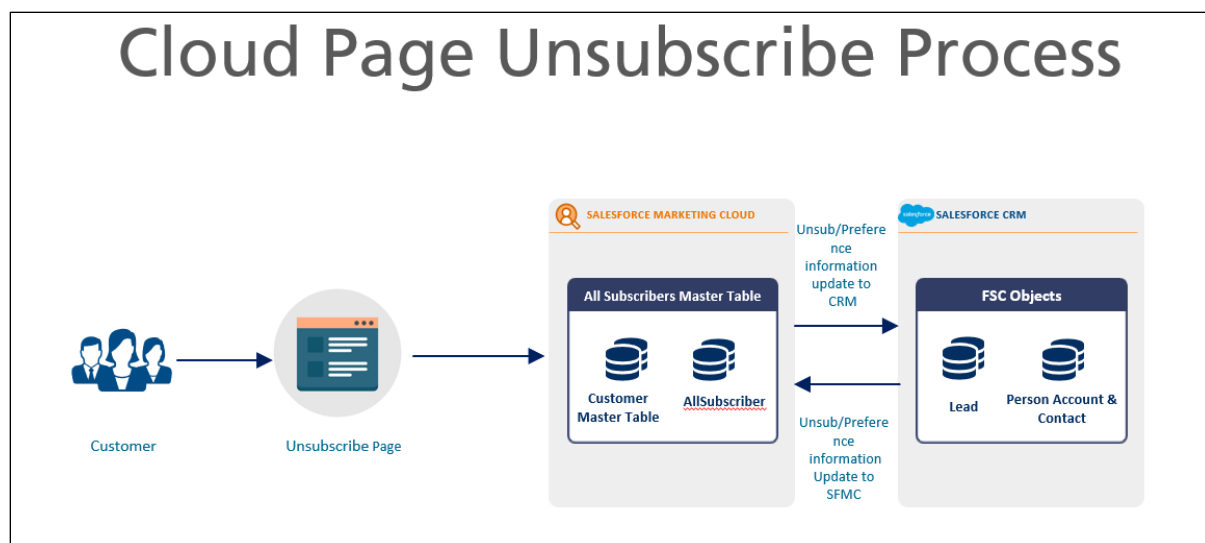
✓ Opt-in/Unsub information gets updated in All Subscribers

✓ Opt-in/Unsub information also will be updated in Master Data Extensions

✓ Un-subscription/Preferences are specific to Business Units

✓ Un-subscription information would be pushed from SFMC Preference Page to SF-CRM (FSC)

   ▪ PLACEHOLDER - Unsubscribe data will update in SFMC and SF – *It can be found in TDD Content Section 4.3.2 (Egress)*

   ▪ PLACEHOLDER – Opt-in Confirmation – It can be found in TDD Content Section 4.3 (Data Model)

- PLACEHOLDER – Activity log – It can be found in TDD Content Section 4.3 (Data Model)
- PLACEHOLDER- Filter for contact information - – It can be found in TDD Content Section 4.2 (Technical Architecture)
- Placeholder- Add object to be synced – *It is added in previous page.*

Integration Impact

Parent Business Unit would be connected with AAG Sandbox to determine the data modelling in SFMC. The same would be disconnected once dependencies are resolved. Salesforce CRM (FSC) will be integrated to SFMC via Marketing Cloud Connect Package.

Implementation

This table denotes the SFMC functionality implementation (Permanent/Non-Permanent)

Category	Implementation	Comments
User Access Management	Non-permanent	Setup User(s)/Permissions can be modified
Sender Authentication Package	Permanent	Specified domain will be registered permanently
Business Unit	Non-permanent	Business Units can be renamed
Reply Mail Management	Non-permanent	RMM can be modified as needed
Send Classification	Non-permanent	Send Classification can be modified as needed
Sender Profile	Non-permanent	Sender Profile can be renamed

Delivery Profile	Non-permanent	Delivery Profile can be renamed
Mobile Connect	Permanent	Provisioned short code will be permanent
Folder Structure	Non-permanent	Folder Structure can be modified as needed
Data Model	Non-permanent	Data Model can be modified as needed

User Stories

From 6/26 – First Sprint of the project begins. However, considering outstanding dependencies from FAR team, Sprint planning has been changed by prioritizing and reprioritizing activities from Sprint 1 and 2. Development will be done in FOA BU and later will be replicated in Reverse BU.
In Sprint 1, SFMC Parent Business Unit will be integrated with AAG CRM Sandbox and later once dependencies ae resolved, SFMC (Reverse BU) Integration with FSC (CRM) Production org will be done in Sprint 3.

Story #	User Story	Acceptance Criteria
FAR_SFMC_001	I want to set up users in MC app appropriate roles and permissions, so that selected users will be able to access the platform	Users Created based on the Roles, Permissions and BU Access. Distribute passwords
FAR_SFMC_002	I want to set up the connector and integrated AAG Sandbox with SFMC so that data can sync seamlessly from Salesforce CRM to SFMC objects to be synced from SF-Tables sheet	Salesforce CRM configuration complete MC configuration complete
FAR_SFMC_003	I want to create a Master data extension that captures the information from the synchronized	MC Connect is integrated with CRM Correct object(s) are being synced

	DEs so that synchronized data attributes from object(s) are stored in a centralized table	into SFMC Automation is set up and frequency of run is identified
FAR_SFMC_004	I want to create Automation(s) with SQL Queries for Master DE preparation so that I have refreshed customer data and preferences that can be used to create campaign audiences	Relevant SQL queries are built Automation is set up and frequency of run is identified Queries and Automation is set up to populate data in DE
FAR_SFMC_005	I want to setup sample preference centre so that customer preferences can be managed in MC	Will replace both preference centre/ subscription pages
FAR_SFMC_006	I want to Setup Business Unit(s)so that all assets are properly managed with their corresponding product or service.	1) Agree upon Business Unit architecture 2) Business unit name agreed upon with client 3) Configure Parent BU / Child BUs 4) Update user permissions to BUs
FAR_SFMC_007	I want to configure MC Folder Structure, so that assets in MC are clearly displayed and easy to navigate	Review folder structure options with FAR Folder structure is configured according to documentation
FAR_SFMC_008	I want to setup sender profiles so that the appropriate from name and email are ready and can be used across multiple sends without the user needing to recreate it each time	Document values needed for sender name and email. Sender Profile is configured according to Implementation workbook
FAR_SFMC_009	I want to setup Delivery profiles, so that we can ensure all emails have the proper compliance information.	Create delivery profile with: IP Address Header and Footer chosen

FAR_SFMC_010	I want to setup Send Classification so that the right classification is being used for emails.	Valid Sender Profile Valid Delivery Profile
FAR_SFMC_011	I want to setup RMM so that I can manage Reply Emails sent to the Email Address. Emails could be - Queries - Unsubscribe Requests - Auto Replies (Example Out of Office)	Gather name and email for replies Configure RMM Test replies
FAR_SFMC_012	I want to setup Sender Authentication Package, so that I can have a functioning SFMC instance.	Present SAP options to client Agree on best path forward Work with IT OR SF to set up SAP
FAR_SFMC_013	I want to setup SSL so that I can secure my pages hosted in Marketing Cloud	Valid SSL SKU each for: - Link(s) - Image(s) - CloudPages - View as Webpage link
FAR_SFMC_014	I want to set up the connector and integrate Salesforce FSC (Production) with SFMC (Reverse BU) so that data can sync seamlessly from Salesforce CRM to SFMC objects to be synced from SF-Tables sheet	Salesforce CRM configuration complete MC configuration complete
FAR_SFMC_015	I want to have Data extensions created for segmenting audiences for campaigns in Marketing Cloud, so that emails can be sent to the appropriate audience	Data Extension Name Contacts (Sendable)
FAR_SFMC_016	I want standard & Datorama reporting (SFMC OOTB) to track campaign success metrics, so	Review with FAR the types of reports that will be required.

	that I can track engagement using Marketing Cloud capability	Configure reports as per the documentation.
FAR_SFMC_017	I want to create Automation(s) with Data Extract activity so that reports are exported to FTP Location specified by FAR	Valid FTP Location Automation is set up and frequency of run is identified
FAR_SFMC_018	I want to enable Mobile Studio to send SMS messages, so that customers receive notifications	Valid Mobile Configuration details Valid Short Code is available
FAR_SFMC_019	I want to send SMS messages to my customers for submitting form so that customers receive notifications on submission of form	Prospect submits web form with consent to SMS & Calls
FAR_SFMC_020	I want to create a sample journey to send emails	Sample email campaign journey

Change Log

Please note that this table needs to be updated whenever new information is added.

Version	Changes Made	Date
1.0	Initial Draft	26-May-2023
2.0	Added details from Workbook	20-June-2023
3.0	Updated details upon FAR Team confirmation	05-July-2023
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Glossary

ESP	Email Service Provider
SFMC	Salesforce Marketing Cloud
FSC	Financial Services Cloud
BU	Business Units
DE	Data Extension
SAP	Sender Authentication Package
SSL	Secure Sockets Layer
RMM	Reply Mail Management
FTP	File Transfer Protocol

Mapping of BRD & Technical Document

2.1 User Access Management	Technical Design Document Content Section 4.5
2.2 Sender Authentication Package & SSL	Technical Design Document Content Section 4.18 & 4.19
2.3 Business Unit	Technical Design Document Content Section 4.4
2.4 Reply Mail Management	Technical Design Document Content Section 4.7
2.5 Send Classification	Technical Design Document Content Section 4.7
2.6 Sender Profile	Technical Design Document Content Section 4.7
2.7 Delivery Profile	Technical Design Document Content Section 4.7
2.8 Mobile Connect	Technical Design Document Content Section 4.20
2.11 Data Model	Technical Design Document Content Section 6

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