# Roadmap to Real Time

## Salesforce Interaction Studio

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# Presenter

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# MUNVO'S EXPERIENCE

**2005**
Munvo partners with Unica

**2010**
Unica (Affinium) acquired by IBM

**2012**
Munvo partners with Neolane

**2013**
Adobe acquires Neolane

**2017**
Munvo partners with Evergage

**2020**
Salesforce acquires Evergage

**30+**
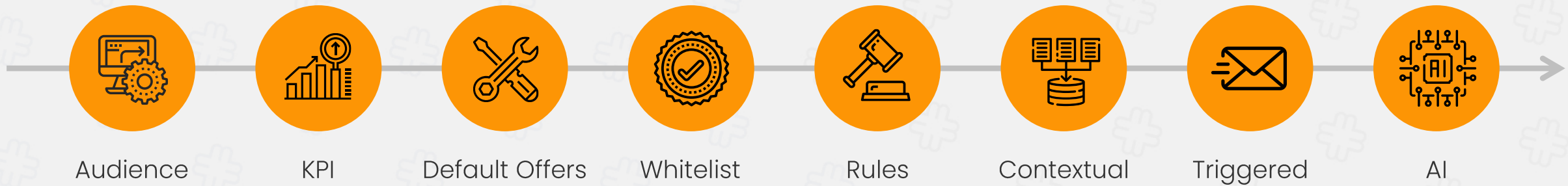Inbound Enterprise Customers

**1m**
Impressions Per Month On Average

**500+**
Inbound Journeys Implemented

**3**
Inbound Channels Integrated on Average

# Roadmap

Audience    KPI    Default Offers    Whitelist    Rules    Contextual    Triggered    AI

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# Audience



Audience | KPI | Default Offers | Whitelist | Rules | Contextual | Triggered | AI

- Define customer journey across different audiences and channels

- Define an experience across channels

- Define a data model that tracks a customer along a set of actionable events during a journey

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# KPI and Offer Management

Audience  **KPI**  Default offers  Whitelist  Rules  Contextual  Triggered  AI
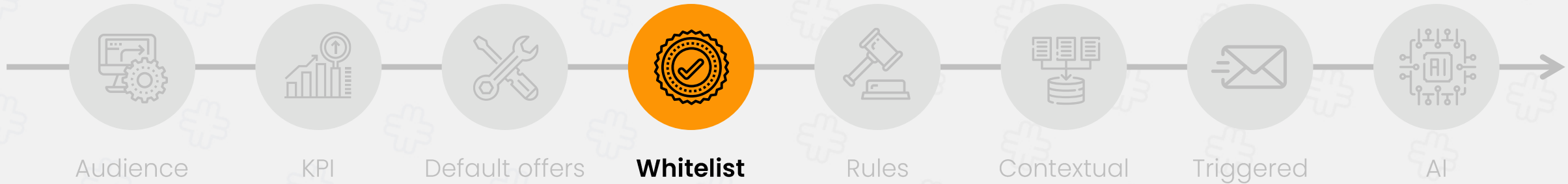
- Define a response framework that is agnostic to a marketing campaign

- Define a unified customer contact and response history

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# Default Offers

Audience  KPI  **Default offers**  Whitelist  Rules  Contextual  Triggered  AI

- Implement the default experience for the customer

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# Whitelist Offers

Audience    KPI    Default offers    **Whitelist**    Rules    Contextual    Triggered    AI

- Cross-channel targeting from outbound to inbound

- Unified customer experience across channels

- Begin measuring and qualifying marketing activities

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# Rule Based Offers

Audience  KPI  Default offers  Whitelist  **Rules**  Contextual  Triggered  AI

- Customer experience defined in real time based on profile

- Real-Time decision making provides a stronger customer experience

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# Contextual Data

Audience　　KPI　　Default offers　　Whitelist　　Rules　　**Contextual**　　Triggered　　AI

- Utilize contextual triggers to pivot the conversation to relevant messaging

- Events and behavioural data utilized

- Dynamic marketing conversation with the customer

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# Triggered Messages

Audience | KPI | Default offers | Whitelist | Rules | Contextual | **Triggered** | AI

- Close the customer journey with cross-channel communications on other channels

- Omni-channel experience

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# Artificial Intelligence and Learning

Audience   KPI   Default offers   Whitelist   Rules   Contextual   Triggered   **AI**

- AI optimizations to increase KPI

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# Real-Time Pitfalls

## CURRENT

- × Team size and decision enablement

- × No testing framework / environment

- × Lack of reusable KPI and reporting framework

- × One-way conversation with the customer where offers are determined in batch

- × Complexity of the customer profile and complexity of segmentation in real time

## FUTURE

- × Data privacy and marketing audit framework

- × Customer fatigue across online channels

# Salesforce Interaction Studio (powered by Evergage)
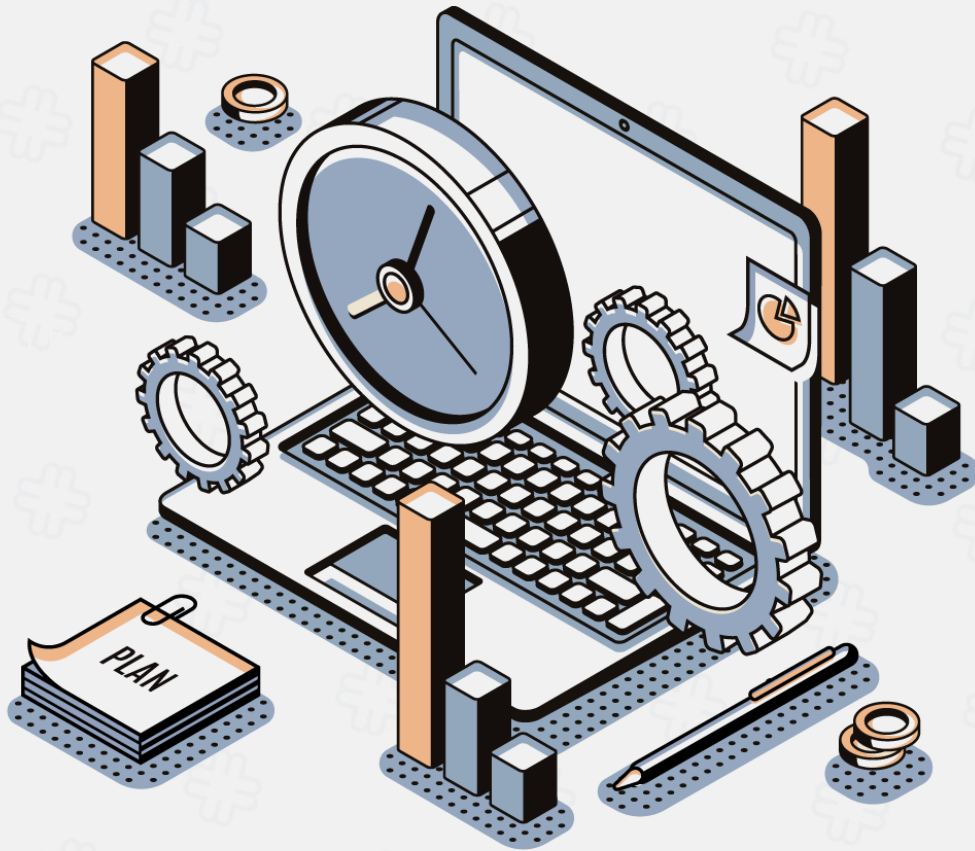
### Customer Experience

Interaction Studio is a best of breed solution for customer engagement. It empowers marketers to create dynamic experiences on their web or mobile channels

### Accelerated AI Learning

Interaction Studio allows for rapid development of Next Best Action (NBA) and Next Best Offer (NBO) learning to provide relevant material to customers

### Ease of Implementation

Interaction Studio implementations allow for quicker progress through the technological roadmap by focusing on key functionalities

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# Ready to get started?

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