

2021

AUTOMATED JOURNEY MANAGEMENT FOR SIGNATURE BASED PROCESSES

PRESENTED BY: 4POINT



INTRODUCTION

In a constantly changing world of transitioning sales and marketing processes online and modernizing end-to-end sales cycles, organizations struggle to bring together customization and automation into their signature-based sales process while maintaining customer satisfaction.

Currently, many organizations are still using generic marketing messages and tactics to try and turn current and potential customers into buyers, with little to no success. By maintaining this type of process in your organization, missed opportunities and too much time spent on nurturing the sales process will become the norm.

Barriers to introducing automation to your sales and marketing can include lack of the appropriate software, not fully understanding how to integrate your current software and CRM tools to bring automation to the customer, and a disconnect between your sales and marketing teams. These barriers are a constant in many organizations, but by introducing the use of marketing automation, and digital forms, your signature-based sales process can turn current and potential customers into repeat buyers.

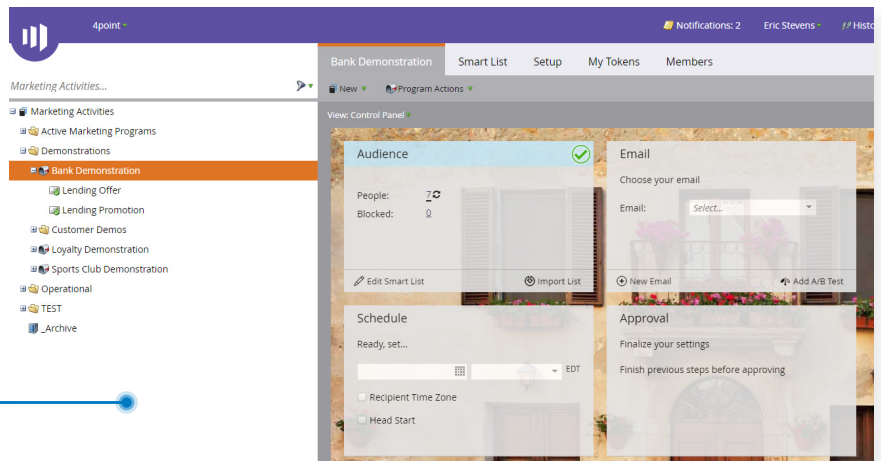
This customizable end-to-end sales process includes:

- **Marketing Automation** - automated and customizable acquisition and nurture emails to turn current and potential customers into buyers through personalized offers.
- **Digital Forms** - information is collected into the digital forms and pushed to the customer so they can choose what products or services work best for them. This information is then pulled together into a contract with only the relevant, pre-approved legal information required.
- **Digital Signature** - the contract is created through digital forms, where the customer can securely sign the document online and is legally binding.
- **Marketing Automation** - all of this information is then pushed back into the marketing automation tool and can trigger further emails or nurture campaigns, extending the sales cycle.

With these three elements working together, this custom solution enables you and your team to automate the entire sales process while still bringing a level of customization and personalization to the customer experience.

MARKETING AUTOMATION

This entire process starts by introducing marketing automation to your sales and marketing process. Powerful automation tools and integration capabilities means you can pull information from your business data sources into the marketing automation tool to ensure all of the emails sent out are personalized to the customer.



The following example shows the marketing automation screen with an email campaign for a financial institution.



Your Business is Unique

And your business banking and financing options should be unique and specific to you.

Make a one-time purchase, or get ongoing access to funds — we've got flexible borrowing options.

Gain the flexibility to cover large expenses, to manage day-to-day operating expenses or to protect your business from unexpected cash shortfalls

[Read More](#)

This process can start with an initial acquisition email that is more generic, and can lead into a nurture campaign once more information is discovered about the customer. Anything that is updated in your business data source is updated in the marketing automation tool - as your sales team discovers more about the behaviours and characteristics of the customer, this can trigger different campaigns and offers for the customer. This automation will ensure all information is up to date and save time for your sales team.

The process starts with a generic email to the customer. Marketing automation allows you to create emails and campaigns that are on brand for your organization and targeted to those people most likely to be interested in your products or services.

When you are ready to push an offer to your customers, a personalized email will be sent to your customers, introducing the offer with a call to action to learn more about what is included in the offer.



When you are ready to push a specific offer to your customers, a more personalized and customized email can be created from the information stored in the the business data source and the marketing automation tool.

Wile Coyote

Your Business is Unique

Hi Wile,

And your business banking and financing options should be unique and specific to you. Make a one-time purchase, or get ongoing access to funds — we've got flexible borrowing options. Gain the flexibility to cover large expenses, to manage day-to-day operating expenses or to protect your business from unexpected cash shortfalls

We understand the needs of small organizations like yours. For companies like yours in the Agriculture industry we have special programs and financing plans to meet your needs.

- Cover large expenses
- Cover operating expenses
- Avoid cash shortfalls
- Custom Financing Plans for Agriculture

Please click the link below to select the financing products that are right for you.

If you would like to discuss your options or review any aspect of this offer please contact Eric, your financial advisor, at 613 513 7928 or eric.stevens@4point.com.

[View Your Financing Options](#)

The personalization from the marketing automation tool allows you to customize many different elements, and makes what was once a mass marketed email feel personalized to the customer.

Based on the information in the marketing automation tool, we know that this customer is in the Agriculture industry. Using this information you can include options specific to their industry, further enhancing the customer experience.

Financial advisor information, which was linked to the customer in the business data source, is presented in the email, giving your customers the option to speak to their specific representative.

This link leads the customer to a personalized brochure that has information they are interested in. This lets you show them the options available to them for your product or service and highlight other products that might be of interest, without having to build multiple dedicated brochures for each industry or customer interest.

Once they click to learn more, they will be sent to the personalized brochure that is customized to that specific customer with their specific offer.

Elements that can be customized using any data available in the business data source or marketing automation tool, including custom fields. Examples include the company name, their account manager, the size of their organization, and elements of the offer that are specific to the characteristics of their organization. Do you have different offerings based on the company size? Revenue? Location? Industry? Only the offerings that are relevant to the customer will be shown, and all of this information is pulled together the instant they click on the call to action in the marketing automation email.

Every single element of this offer document can be customizable - from the header and image down to each specific word. This customization ensures the customer feels like the messages coming from you are personalized, even though the entire process has been automated.



Hello Wile Coyote

Thank you for considering The Bank of Greely for your small business banking needs. This information package has been created specifically for you based on the information you have provided. Once you have reviewed the material please use the link to select and customize your financial solution.

If you have any questions please contact your financial advisor **Eric Stevens** at (613) 513-7928 or by email at eric.stevens@4point.com.

[SELECT YOUR FINANCIAL SERVICE](#)

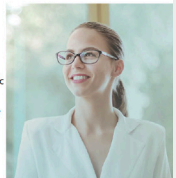
When using the online link you will need to login using an account you have already created or create a new account.

YOUR BUSINESS IS UNIQUE

And your business banking and financing options should be unique and specific to you.

Make a one-time purchase, or get ongoing access to funds — we've got flexible borrowing options.

Gain the flexibility to cover large expenses, to manage day-to-day operating expenses or to protect your business from unexpected cash shortfalls



Once a customer clicks to learn more about the offer, the personalized brochure is generated using the data pulled from the business data source and marketing automation tool, and provides the relevant product information to the customer. The data and the product information remains constant through the entire process.

We have also included the advisor contact information to ensure that the customer has the option to contact us directly at any time.

When the customer is ready to purchase, they can click through to the online form that begins the selection process to complete the purchase.

KEY MESSAGES

- All the information is customized to the specific customer.
- The information about that customer is dynamically pulled together as soon as the customer clicks on the call to action.
- The offer will look the same on the surface for all customers, but different elements can be dynamically changed based on predetermined characteristics of the customer.
- This begins a personalized and interactive experience for the customer.
- This process brings a higher level of sophistication to a traditional proposal or offer.



AGRICULTURE

You need a bank that understands the unique business of agriculture including production cycles, market changes, and consumer demands. The Bank of Greely can help with financial advice, products and services customized to the specifics of your agriculture business.

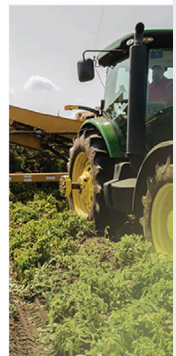
Whether you need a loan to buy equipment for your farm or you want financial planning and investment advice, our experienced team of Agriculture Banking Specialists, Account Managers and Investment Specialists can help you find the solutions that are right for you and for your business. With more than a century of agriculture experience, we're in this business for the long haul, because we know you are too!

Professionals who understand your business

When you need a hand, we're here to help. With a nationwide sales force you can find a business advisor in your area. As your primary contact, your business advisor will help you identify appropriate banking solutions for you and your farm business.

Products to fit your business and personal financial goals

As a farm business owner, your business and personal financial goals are connected. We understand that because we work with farmers and agriculture experts every day to meet their specific and unique needs.



DIGITAL FORMS

If the customer wants to accept the offer, a second call to action is included in the brochure to make additional selections to move along the sales process.



Hello Wile Coyote

Thank you for considering The Bank of Greely for your small business banking needs. This information package has been created specifically for you based on the information you have provided. Once you have reviewed the material please use the link to select and customize your financial solution.

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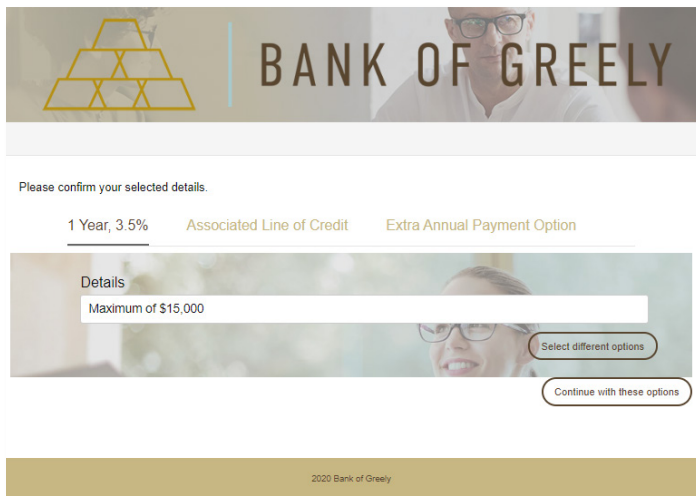
[SELECT YOUR FINANCIAL SERVICE](#)

When using the online link you will need to login using an account you have already created or create a new account.

Once the customer clicks the link in the brochure, they are taken to an online digital form where they can make the necessary selections based on your service offering and their needs.

All of this information is continuously customized to the customer. All of the data used to personalize the emails and the brochure continue to flow through this process based on the information that has been pulled from the business data source through the marketing automation tool. This continuity improves the customer experience by ensuring customers don't have to re-enter any information that they have already provided, and only shows relevant options they can take advantage of.

Examples of the selections that a customer may need to make can include quantities of a product, service requirements, and loan interest rates. Any possible combination of the product or service you provide can be included in the form so the customer can continue with a personalized and interactive sales process.



Please confirm your selected details.

1 Year, 3.5% Associated Line of Credit Extra Annual Payment Option

Details
Maximum of \$15,000

Select different options

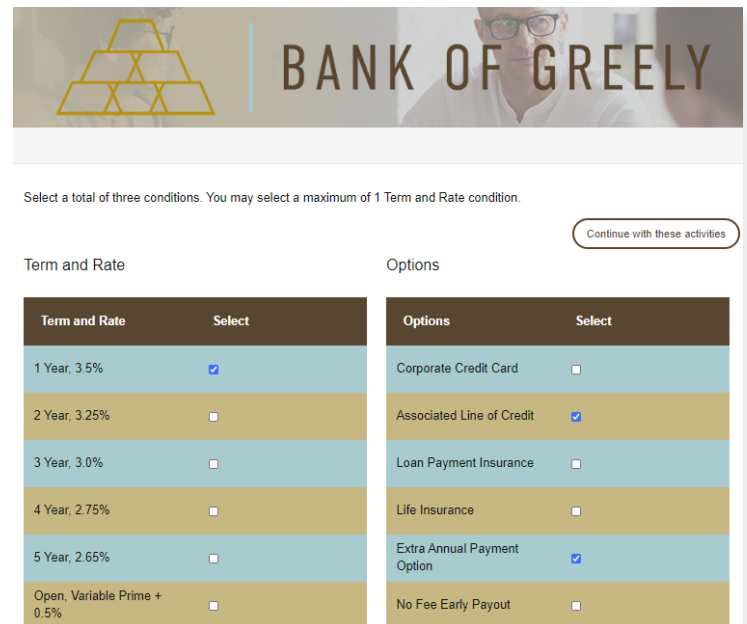
Continue with these options

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Once the selections have been made, the customer is brought to a summary page so they can review and edit all of their selections if necessary.

KEY MESSAGES

- The integration between systems ensures continuous customization and consistency from business data source, marketing automation tool and digital form.
- The interactive experience allows the customer to create a personalized product or service for their needs.
- The continuity and personalization ensures an improved customer experience.

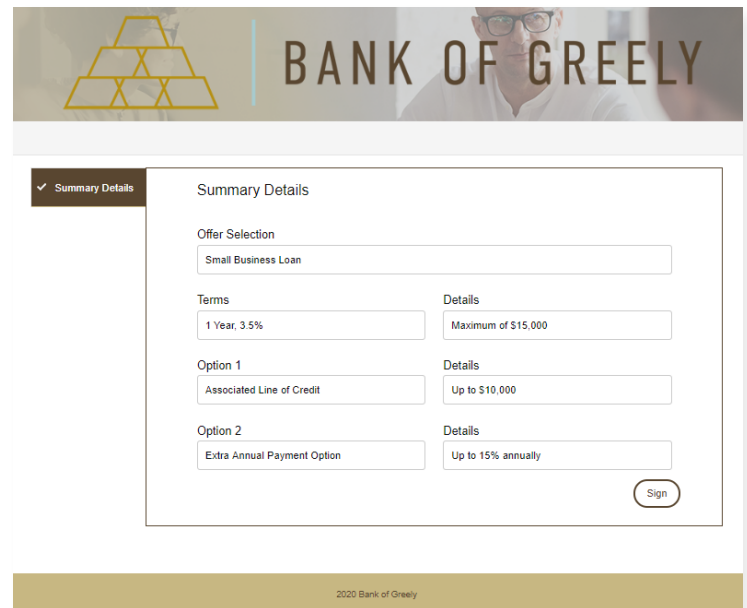


Select a total of three conditions. You may select a maximum of 1 Term and Rate condition.

Continue with these activities

Term and Rate		Options	
Term and Rate	Select	Options	Select
1 Year, 3.5%	<input checked="" type="checkbox"/>	Corporate Credit Card	<input type="checkbox"/>
2 Year, 3.25%	<input type="checkbox"/>	Associated Line of Credit	<input checked="" type="checkbox"/>
3 Year, 3.0%	<input type="checkbox"/>	Loan Payment Insurance	<input type="checkbox"/>
4 Year, 2.75%	<input type="checkbox"/>	Life Insurance	<input type="checkbox"/>
5 Year, 2.65%	<input type="checkbox"/>	Extra Annual Payment Option	<input checked="" type="checkbox"/>
Open, Variable Prime + 0.5%	<input type="checkbox"/>	No Fee Early Payout	<input type="checkbox"/>

Because of the integration between your business data source, marketing automation tool and digital form, no further information is needed from the customer. Their name, address, and billing address has cascaded through this entire process to ensure the customer doesn't have to confirm who they are.



Summary Details

Offer Selection
Small Business Loan

Terms	Details
1 Year, 3.5%	Maximum of \$15,000
Option 1 Associated Line of Credit	Details Up to \$10,000
Option 2 Extra Annual Payment Option	Details Up to 15% annually

Sign

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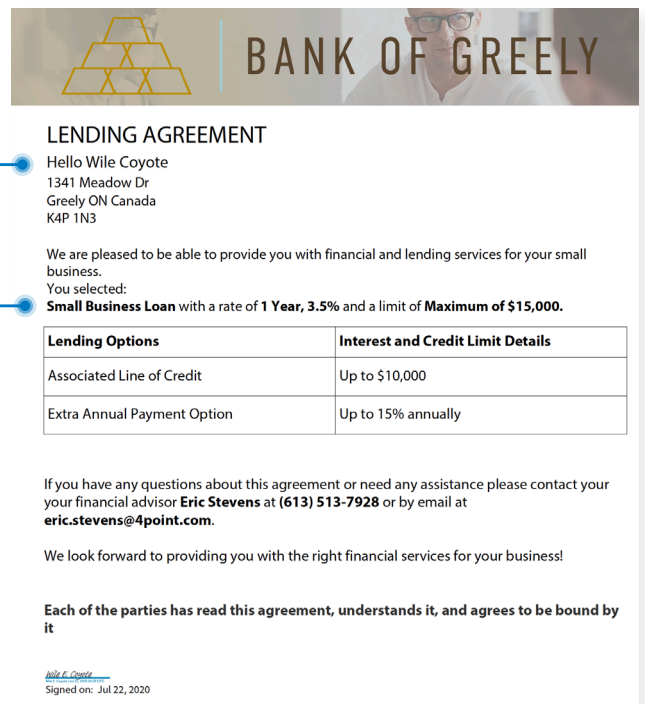
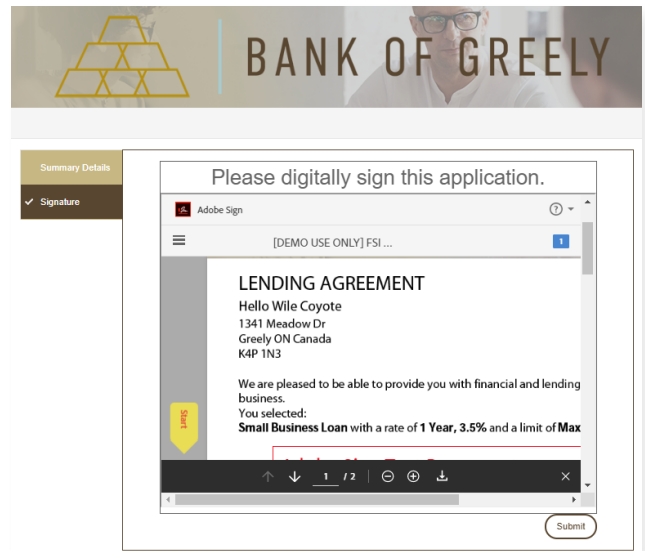
DIGITAL SIGNATURES

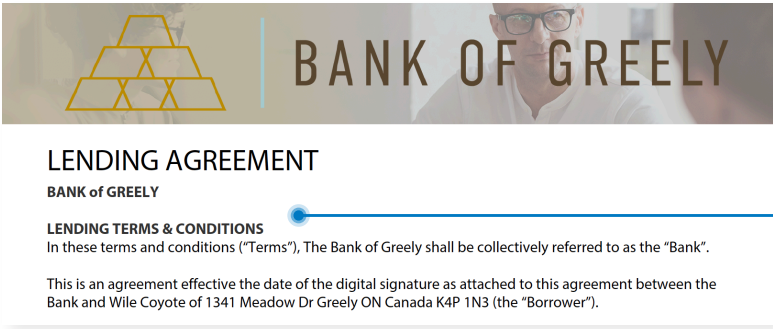
When the customer has reviewed the summary page and is ready to accept the offer, every element that is required to create a contract to complete the sales process is dynamically inserted into a contract.

Based on the customer information and the selections they made, only the relevant information that is needed to create this legally binding document will be included. Examples of this include certain requirements based on their location, or certain clauses based on the product or service specifications they selected in the online form. All of this information is already approved by your legal department, and is pulled together through the digital forms.

When the customer accepts the offer, the data is dynamically inserted into a contract, including the billing information for the customer. This means the customer never has to submit this information multiple times.

The dynamic contract includes only relevant elements to the customer, so they aren't overwhelmed with contract information that doesn't apply to them.

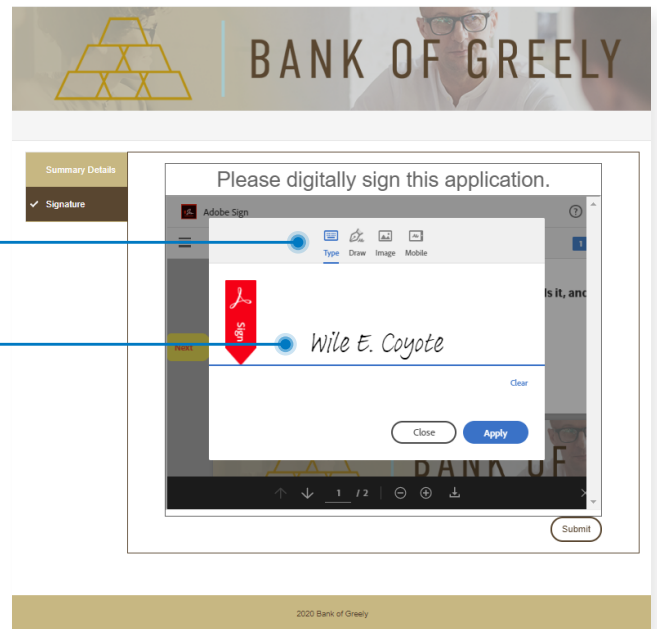




When the information is dynamically inserted into the contract, the terms and conditions are already approved by legal, and are only the clauses and conditions that affect the customers based on their location or the offer are included in the contract.

By introducing this dynamic way to bring the contract together, you can ensure that the contract and the terms and conditions are relevant to what the customer is purchasing, and the customer is not overwhelmed by a contract that is not fully relevant to what they are purchasing.

Once the contract is complete, the customer can digitally sign it online. Once signed, it is cryptographically validated as a legally signed document.



Allow customers to sign the document by typing in their name, drawing a signature, or inserting a picture.

Once the customer signs and submits the document, it is cryptographically validated and is now considered a legally signed document - all digitally.

KEY MESSAGES

- No unnecessary information is included in the contract.
- The information required in the contract is dynamically pulled from your business data source, marketing automation tool, and other areas of your organization to ensure the contract is legally binding.
- Continuous end-to-end customization throughout the entire sales process.
- The entire process is conducted online - no paper copies for signature are required.
- This process introduces a high level of sophistication compared to a traditional sales process.



MARKETING AUTOMATION

Once the contract is signed and the initial sales process is complete, this contract can be pushed back into your business data source and marketing automation tool to trigger additional activities from your organization.

Examples of these activities include a notification sent to the account manager to take the appropriate next steps to welcome them as a customer, an email being triggered to send to the customer with any required follow-up collateral like welcome packages or service documents, or other nurture campaigns to push other products or services that are relevant to what they purchased.

This automation allows you to continue the sales process even when it may be complete on the surface. Once a contract has been signed and validated, the process can start all over again through the marketing automation tool.

KEY MESSAGES

- Automation allows you to continue the sales process.
- All information is housed in the business data source and marketing automation tool - the customer will never receive something that is not relevant to them and their needs.

PARTING WORDS

In the past, the entire sales process was manual and generic - customers were pushed to a generic document or landing page that made no mention of who they were and was not customized to their needs. If a customer was interested, the sales team then had to pull the proper information together from a variety of sources and send for a physical signature. Once this was completed (which could take days), the sales team then had to manually put all of this information back into the company's back end systems.

This arduous and time consuming process meant your customers were experiencing a generic and long process in order to get access to the products or services they needed. This streamlined process allows customers to feel like they are being handled as a known customer and person, as opposed to someone who is being mass-marketed to. The contract creation and follow-up process are much more personalized, so customer satisfaction will be much higher.

By introducing this online end-to-end sales process for your signature-based sales, you can take a historically manual process and create a customized and automated process that creates a positive and interactive customer experience so your sales team can focus on their customer relationships and bring in the next sale.

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