Enabling High Volume Appointment Confirmations in Salesforce CRM with Calendar Reminders

Enabled migration of appointment booking confirmation email deployment from Salesforce CRM to Adobe Campaign Message Center

Supported higher volume of appointment bookings with calendar attachments to be sent (Salesforce CRM limited to 5,000 emails per day to non-Salesforce users)

Allowed consistent branding of appointment booking confirmation emails with the rest of the client's brand guidelines

Client

Our client is a multinational financial services provider that offers a range of insurance, wealth management, and investment solutions to individuals and businesses. The company's presence in multiple countries aims to help its clients achieve financial security and well-being by offering tailored financial products and services. It strongly focuses on innovation and technology and is committed to promoting sustainability and social responsibility.

Challenges

1 Capacity Limitation

faced by the client was that their current solution for deploying appointment booking confirmation emails using Salesforce CRM had a limited daily capacity of 5,000 emails per day. However, the client projected that they would need to send 9,000 emails daily due to the expected number of appointment bookings with advisors. This posed a significant challenge as the current capacity was insufficient, and the client needed to find a solution that could handle the increased volume.

2 Technical Uncertainty

was technical uncertainty about whether sending appointment booking emails with a calendar attachment was possible using Message Center. The client needed to send calendar attachments with appointment booking confirmation emails, and there was uncertainty about whether this could be achieved using Message Center. This created a need to investigate and test the capabilities of Message Center to ensure it could meet the client's requirements.

3 Custom Process Maintenance

was that the client had a custom process for sending appointment booking confirmation emails that they wanted to maintain. The client requested that this process be followed to ensure consistency and minimize disruption to their existing workflow.

4 Data Processing Compatibility

the client needed to ensure that the way Salesforce CRM sent data would be processable by Message Center via API calls. This required validation to ensure that file content could be sent as a binary string and compatible with Message Center's API. This was important to ensure that the integration between Salesforce CRM and Message Center would be seamless and effective.

Solution

Our solution was tailored to the client's specific needs and involved a combination of out-of-the-box functionality and custom development to achieve the desired outcome. Our solutions included several steps:

We gathered requirements around the details

and personalization required for the appointment booking confirmation emails, as well as the types of files that needed to be attached, such as ICS calendar files, PDFs, or TXT files. This allowed us to understand the client's needs and tailor the solution accordingly.

We tested the out-of-the-box functionality

of Message Center to determine whether it was capable of attaching files to transactional emails. This helped us identify limitations and determine whether a custom approach was necessary.

Based on our findings, we developed a custom approach

that involved using API calls to send data such as email addresses, first names, and appointment booking details, as well as JavaScript Server Pages (JSSP) to process and create files that could be attached to the emails. We also used Message Center events and templates to send emails and implemented a workflow to clean up appointment booking files after a set amount of time to prevent clutter.

Benefits

Continuity of Service

The project provided a solution that allowed for the continuity of service, meaning that emails could still be sent out to customers/prospects with similar appointment booking details and calendar attachments. This ensured that the service provided by the client was not interrupted, and customers could continue to receive the necessary information they needed.

Improved Customer Experience

The project supported the client's desire to improve customer experience by enabling real-time communications using Message Center. This allowed the client to engage with their customers more efficiently and effectively, ensuring that they received the necessary information in a timely and convenient manner.

Collaboration and Integration

The project enabled collaboration between Salesforce CRM team and the client's Adobe Campaign operations team. This collaboration and integration of different teams and systems helped streamline processes and improve efficiency, ensuring the project was completed successfully and on time.

🏆 Results

✅ The ongoing project is expected to **increase the reach of the appointment booking service** for more advisors. At the same time, it enables internal process improvements, adds more touchpoints to complex customer journeys, and allows for follow-up notifications from Message Center, ultimately improving the **overall efficiency and effectiveness** of the system and **enhancing the customer experience**.

Quote from Munvo

> We are delighted to have delivered a project that met our client's needs, offering a robust proof-of-concept to validate the functionality of Message Center. Our team's ability to deliver excellent demos to the client allowed us to showcase the solution's capabilities and helped to ensure that the project was a resounding success.
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> **— Amit Desai, Software Consultant at Munvo**