

MARKETING CLOUD DOCUMENT MANAGEMENT

BEST PRACTICES PLAYBOOK



DOCUMENT MANAGEMENT IN THE 4TH INDUSTRIAL REVOLUTION

Why Use Marketing Cloud?



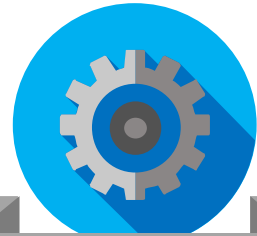
Campaign Management

- Launch awareness and targeted campaigns to attract new customers and clients
- Use automation features to mass email targeted leads and contacts
- Create and assign lead and contact follow-up



Tracking & Productivity

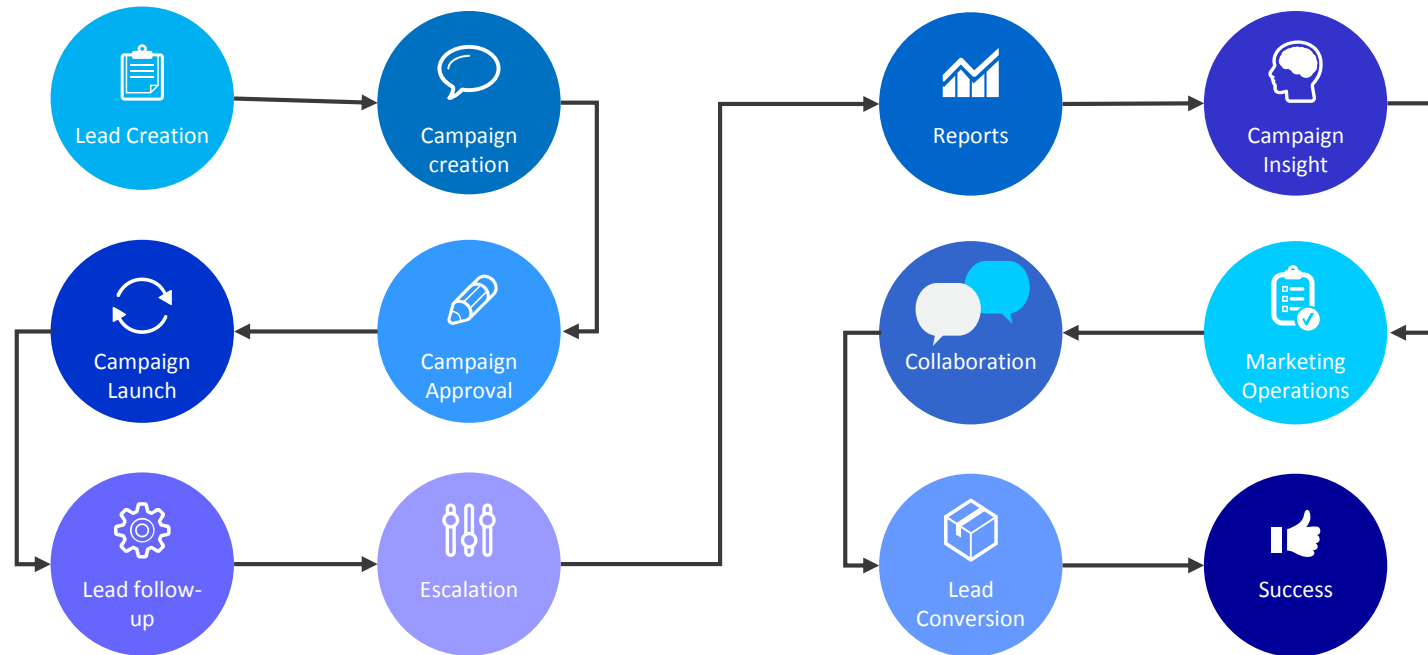
- Save time on how to set up campaigns and use appropriate digital assets
- Get a 360-degree view of marketing campaigns
- Monitor your overall marketing activities through reports and dashboards



Process Management

- Establish marketing processes to follow-up on leads and contacts
- Speed up lead conversion processes
- Learn from how campaigns being conducted to improve marketing performance

What Does Marketing Cloud Bring?



A set of tools to drive marketing excellence for enterprises

Document Management Challenges on Marketing Cloud



Storing Content in Libraries

Salesforce does not have a proper library structure for marketing content limiting the option to organize digital assets properly



Difficulty on Organizing Lead-related Data

Documents related to leads are not stored in an organized fashion



Limits on Sending Mass Emails with Large File Sizes

Mass emails are limited to a file size governing limit



Inability to Retire Old Lead & Campaign Files

There is no mechanism on salesforce to safely, securely and cost effectively retire old files

How Can S-Drive Help?



Visibility

With easy reach to all files related to leads, contacts and campaigns on Salesforce, enterprises will have better understanding of their customer needs



Accessibility

Enterprises can upload and access files critical to run business from anywhere and at anytime.



Sharing

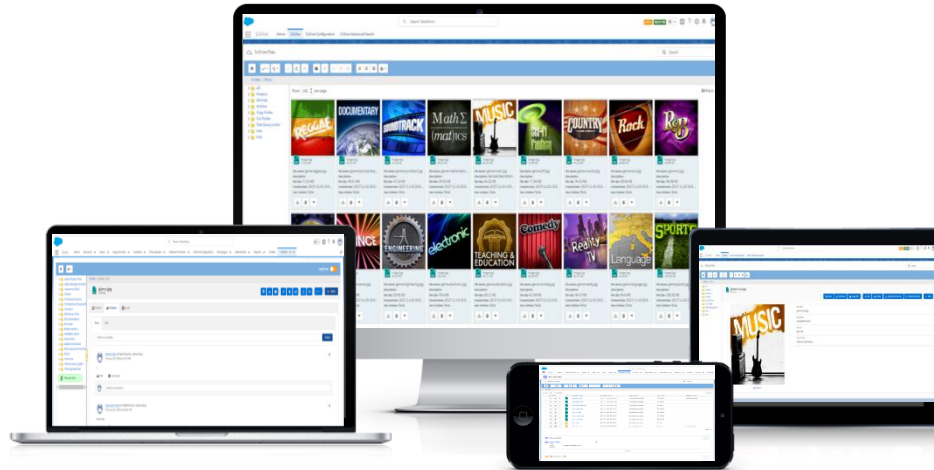
Users having access to files can easily share without having to worry about email size limitations of salesforce



Archiving

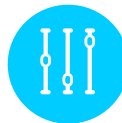
Enterprises can archive files based on their retention policy in a cost-effective manner

Where to Test Drive S-Drive?



Highest Rated

With its 4.9 Score, S-Drive is the most beloved Document Management app on AppExchange



Customizable

The most flexible platform to meet your needs on document management.



Simple to Setup

The easiest to setup among document management apps



Support

One of the most recognized customer support

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