

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:

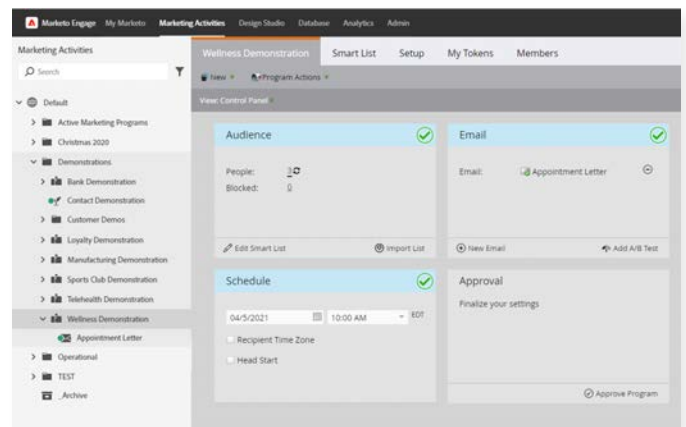
- **Marketing Automation** - automated and customizable acquisition and nurture emails to turn current and potential customers into buyers through personalized offers.
- **Digital Forms** - information is collected into the digital forms and pushed to the customer so they can choose what products or 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 health insurance provider.



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



When you are ready to push a wellness update 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

Get Personalized Wellness Updates

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.

Hi Wile,

Your health has never been more important and we want to help you maintain and improve your well being, your attitude and your life. Greely Health Insurance is offering Wellness Updates that will provide you with personalized tips and advice that will help you feel better, look better and be better.

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

The links below will provide you with more information and guide you through the personalization process.

Insurance consultant 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.

And Greely Health Insurance is always here to help. If you need advice or assistance with a claim or applications please contact your Greely Medical Center healthcare consultant Eric at 613 513 7928 or eric.stevens@4point.com.

[More information about Wellness Updates \(Browser/Mobile\)](#)

This link leads the customer to a personalized brochure that has information they are interested in. This lets you show them the updates available to them and highlight other updates that might be of interest, without having to build multiple dedicated brochures for each wellness update.

[More information about Wellness Updates \(Downloadable PDF\)](#)

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

Elements that can be customized using any data available in the business data source or marketing automation tool, including custom fields. 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 wellness update 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. This document can be offered in a PDF format or web-based format.



Hello Wile Coyote

Your health has never been more important and we want to help you maintain and improve your well being, your attitude and your life. By signing up for the Wellness Updates we can provide you with personalized tips and advice that will help you feel better, look better and be better.

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

[Sign Up for the Wellness Update](#)

When using the online link you will need to login using the account information provided to you in a separate email.

Wellness Updates

Advice and Information

Our Wellness Updates will provide you with useful and relevant advice and information to help you maintain and improve your health and well being. Our advice is personalized and focused on the things that are important to you.

Tips for you and your family

On a monthly basis we will provide you with tips you can use to eat better, exercise more, lose weight and manage any issues you have. And these tips can help you and your family to live better and be healthier.



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

We have also included the insurance consultant 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.



HEALTHY EATING

Better Choices

Our registered Dieticians will provide you with advice and recommendations so that you can make better, healthier choices in the foods you select for your family.

Recipes and Meal Plans

You will have access to a wide range of recipes, meal ideas and meal plans that will help you buy the best ingredients to fit your budget, while giving you healthy options. But best of all, they all taste great and you family will love them!

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[Healthy Eating](#) [Losing Weight](#) [Heart Health](#)

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[Next](#) [Personalize Your Updates](#)

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 wellness update 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.

DIGITAL FORMS

If the customer wants to sign up for wellness updates, a second call to action is included in the brochure to make additional selections to move along the sales process.



Hello Wile Coyote

Your health has never been more important and we want to help you maintain and improve your well being, your attitude and your life. By signing up for the Wellness Updates we can provide you with personalized tips and advice that will help you feel better, look better and be better.

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Once the customer has read through the options, they can click through to the digital form to select the options available to them and complete the enrollment. Once they click through to the form, the information is automatically pulled from your systems and made available to the customer.

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 wellness updates and their needs.

Hi Wile Coyote

In order to provide you with personalized and relevant advice and information, we would like you to provide us with some information about yourself and the areas of your health and wellness that are most important to you.

Please select the health and wellness area that is MOST important to you:

- Losing weight
- Eating better and healthier
- Starting an exercise program
- Managing diabetes
- Better heart health

[Continue with this purpose](#)

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 issues or conditions and lifestyle issues. Any possible combination of the service you provide can be included in the form so the customer can continue with a personalized and interactive enrollment process.

Please add some additional details.

Heart Attack, Stroke or other heart event

I need to lose weight

Please provide any additional information

Not much but some

I worry too much

Continue with these options

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 service for their needs.
- The continuity and personalization ensures an improved customer experience.

Greely Health Insurance

Please identify any recent or chronic medical conditions and lifestyle issues that you are facing. This will help us to provide you with relevant and meaningful information so that you can improve your well being and overall health.

Continue with these selections

Please identify the most recent or significant health issue you are facing right now

Please identify your lifestyle so that we can better customize your plan

| Issue or Condition | Select | Lifestyle Issues | Select |
|------------------------------------------------|-------------------------------------|-----------------------------------|-------------------------------------|
| Heart Attack, Stroke or other heart event | <input checked="" type="checkbox"/> | I don't exercise enough | <input type="checkbox"/> |
| Diagnosed as Obese | <input type="checkbox"/> | I need to lose weight | <input checked="" type="checkbox"/> |
| Major surgery | <input type="checkbox"/> | I need to manage chronic pain | <input type="checkbox"/> |
| Minor Surgery | <input type="checkbox"/> | I am not sleeping well | <input type="checkbox"/> |
| Sprain, break, cut or burn | <input type="checkbox"/> | I worry too much | <input checked="" type="checkbox"/> |
| Localized pain requiring medication or therapy | <input type="checkbox"/> | I'm always depressed | <input type="checkbox"/> |
| | | I am having trouble concentrating | <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.

Greely Health Insurance

Wellness Personalization Summary

Major Issue: Starting an exercise program

Significant Health Issue: Heart Attack, Stroke or other heart event

Lifestyle: I need to lose weight

Lifestyle: I worry too much

Details: Recent minor incident

Details: Not much but some

Details: I cannot sleep

Sign

DIGITAL SIGNATURES

When the customer has reviewed the summary page and is ready to confirm the enrollment, every element that is required to create a contract to complete the enrollment 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 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 completes the enrollment, 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.

AUTHORIZATION AND CONSENT
Hello Wile Coyote
1341 Meadow Dr
Greely ON Canada
K4P 1N3

I, Wile Coyote, agree to receive a Wellness Update provided by Greely Health Insurance on a periodic basis. I understand I can unsubscribe from this service at any time.

Adobe Sign Test Document
Not for commercial use

You have provided the following information that we will use to send you personalized

| Condition or Issue | Details |
|-------------------------------------------|-----------------------|
| Heart Attack, Stroke or other heart event | Recent minor incident |
| I need to lose weight | Not much but some |
| I worry to much | I cannot sleep |

If you have any questions about the Wellness Update, the information we provide or need any assistance please contact your your Greely Health Insurance consultant, **Eric Stevens**, at (613) 513-7928 or by email at eric.stevens@4point.com.

By providing a digital signature on this document you are confirming that you have provided Greely Health Insurance with this personal information and wish to receive

4P E Coyote
Signed on: Mar 15, 2021

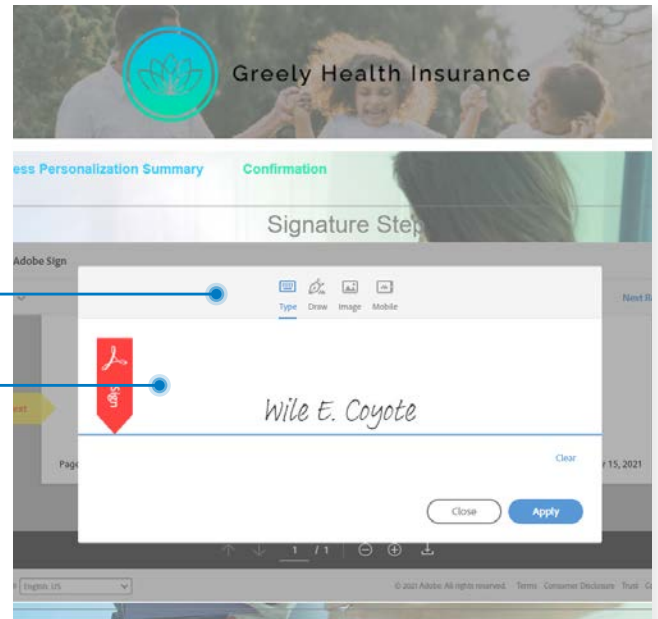
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By introducing this dynamic way to bring the contract together, you can ensure that the contract and the terms and conditions are relevant to what the customer is purchasing, and the customer is not overwhelmed by a contract that is not fully relevant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



MARKETING AUTOMATION

Once the contract is signed and the initial enrollment 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.

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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