

Unified Customer Journeys

How to create cohesive, hyper-personalised experiences that enhance the customer's experience

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Personalisation vs Hyper-Personalisation

Introduction

Personalisation

- Based on static data
- Examples: static fields such as name, company, industry, location, etc
- Segments of relevant groups



Hyper-Personalisation

- Based on static data PLUS dynamic data
- Examples: their current behaviour (views and clicks), predicted needs, recent news, etc
- Segments of one



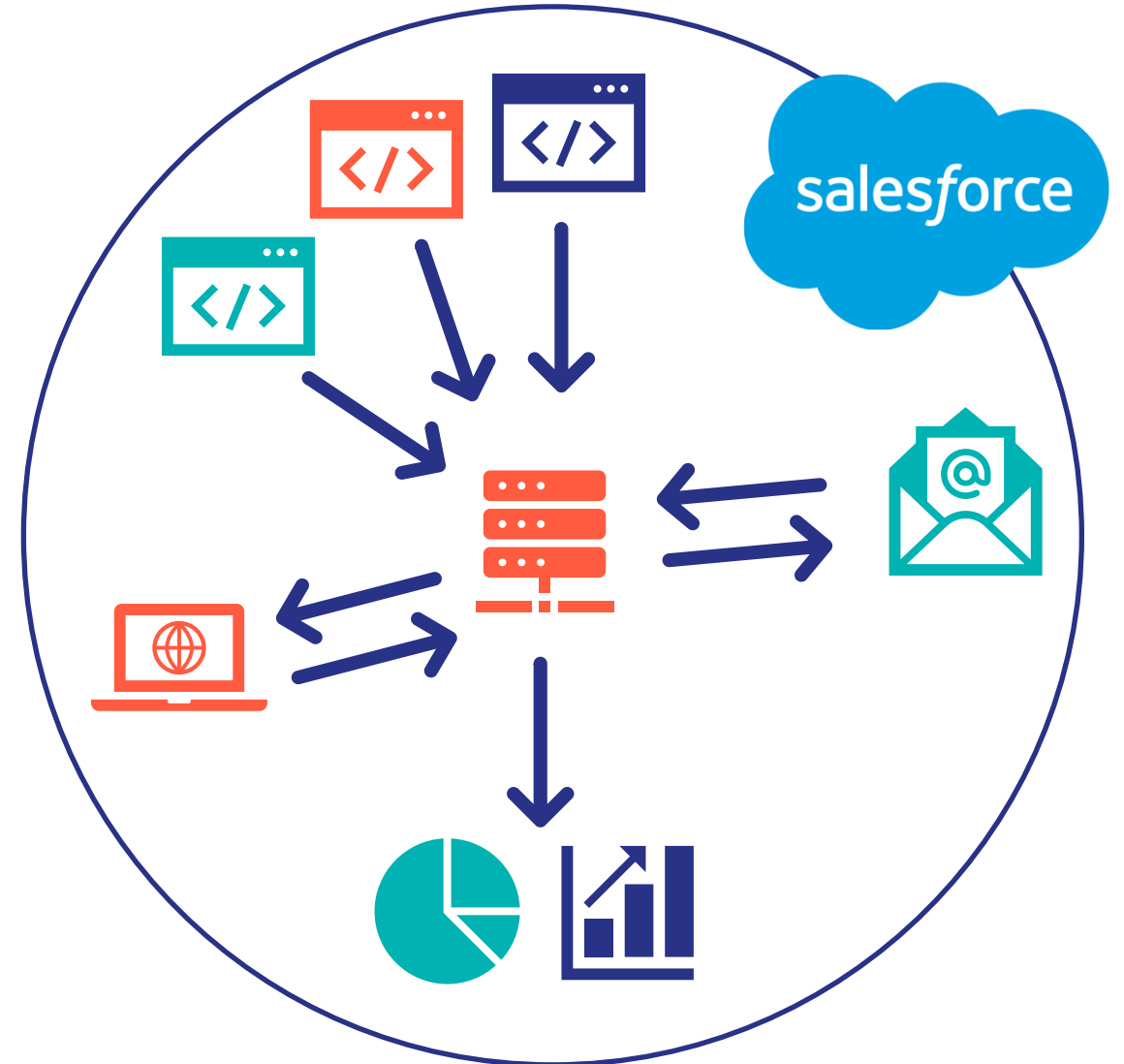
How it used to be

- Websites not connected to CRM
- Limited access to customer data
- Email sends were a manual process
- Reports were on traffic / enquiries and not return on investment (ROI)



How it is now

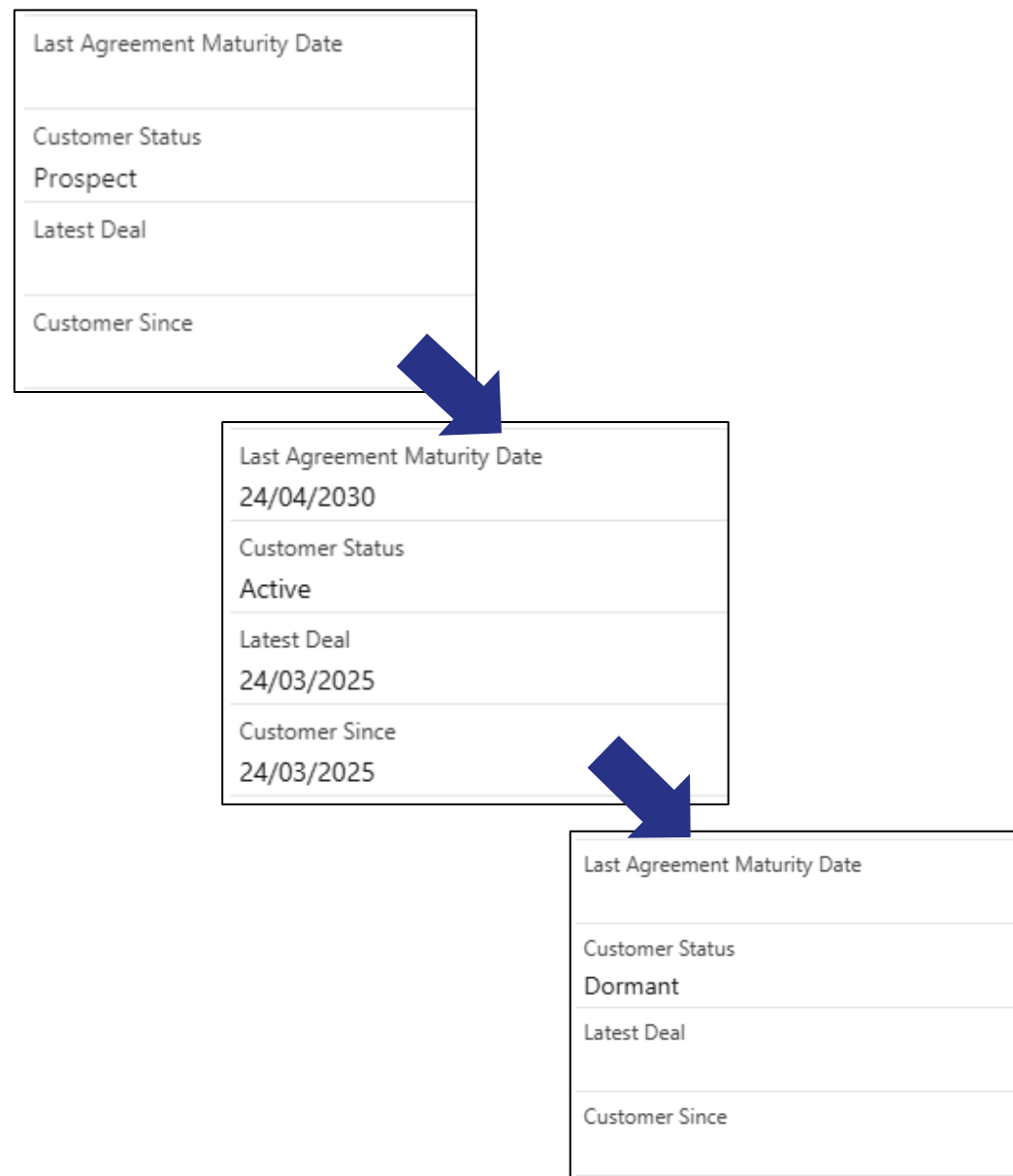
- Websites to talk directly to CRM
- Automate customer emails – CRM data / customer activity
- Customer access to a self-service portal
- Automated reports updated in real-time



How it is now

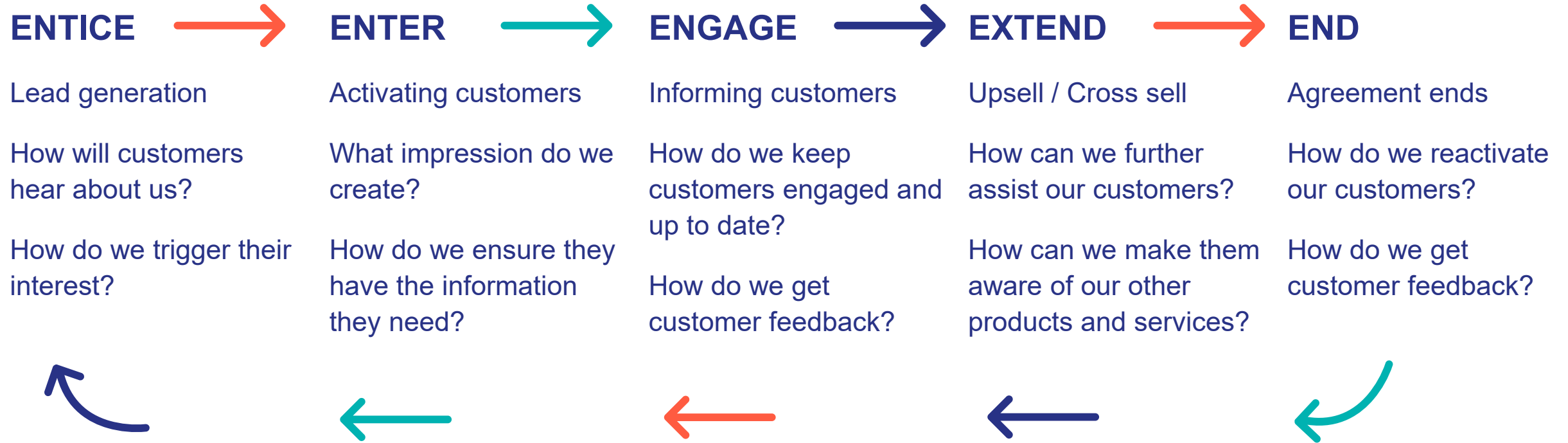
Email

- Dynamic lists – automatically add and remove customers
- Segment by status, industry and brand
- Segment by activity and predicted needs
- 100's of dynamic lists all running in real-time



Unified Customer Journey

The 5 E's



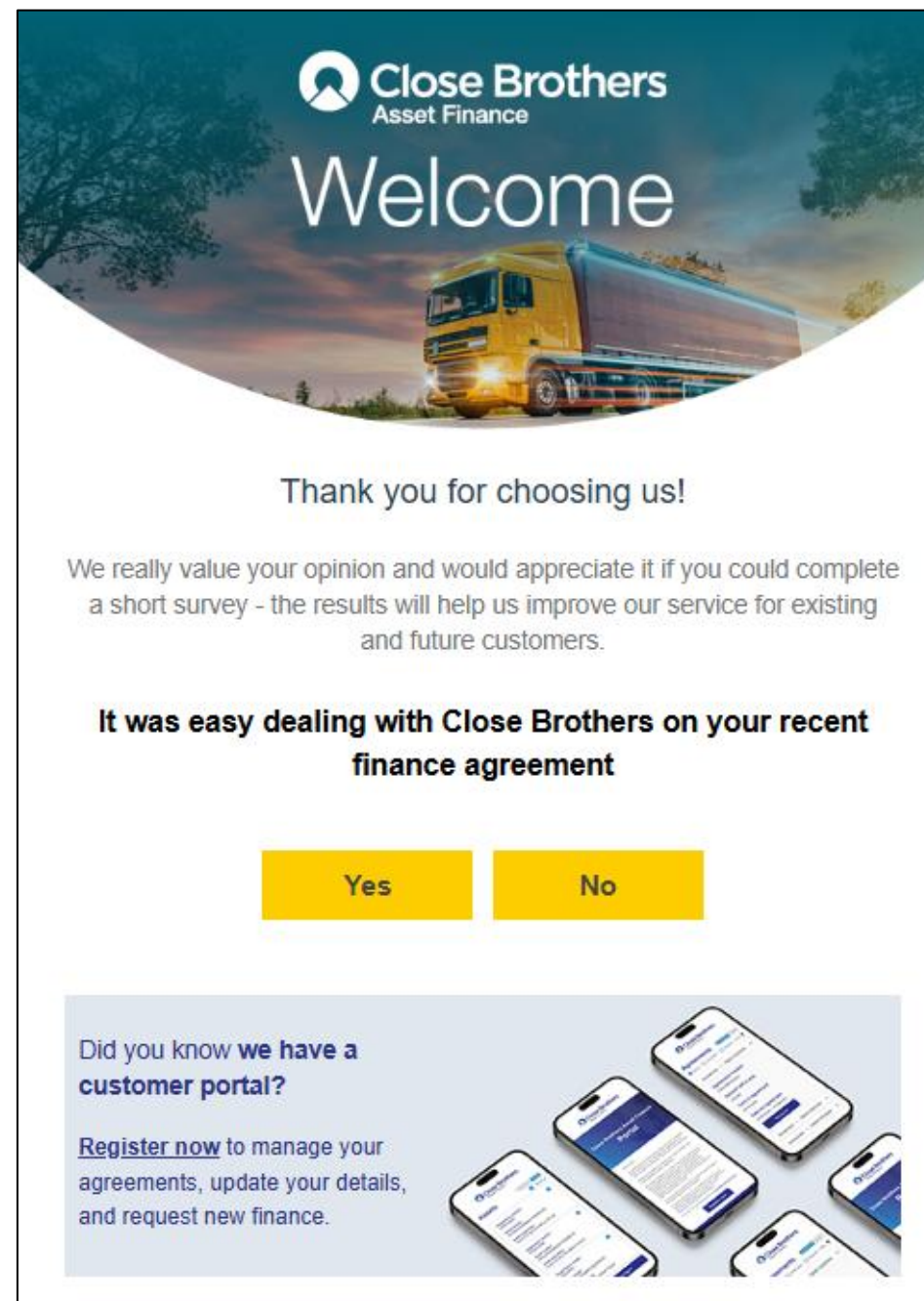
Unified Customer Journey

Automated Email Communications

Customer journey

Welcome email

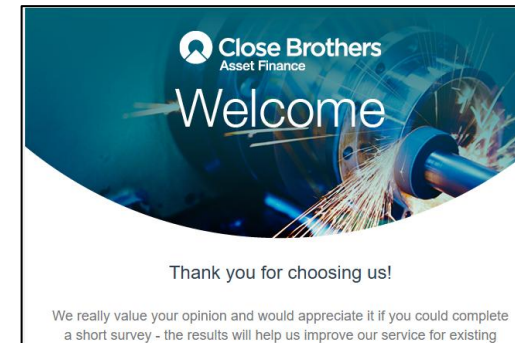
- Customer becomes ACTIVE
- Email comms triggered to Welcome customer
- Links to 'Welcome survey'
- Segmented by industry and brand



Customer journey

Welcome email

- Customer becomes ACTIVE
- Email comms triggered to Welcome customer
- Links to 'Welcome survey'
- Segmented by industry and brand



Customer journey

Surveys

- Survey responses captured
- Responses sent to CRM
- Contact owner / relevant team notified
- Response logged against the Contact record



* 1. It was easy dealing with Close Brothers on your recent finance agreement

☐ Yes

☐ No

* 2. On a scale of 1 to 10, how satisfied are you with the overall service you received from Close Brothers?

☐ 1

☐ 10

Activity

Chatter

Post

Share

↑↓

↻

 Automations to Close Brothers Only

07 March 2023 at 14:52

@Darshna Devi

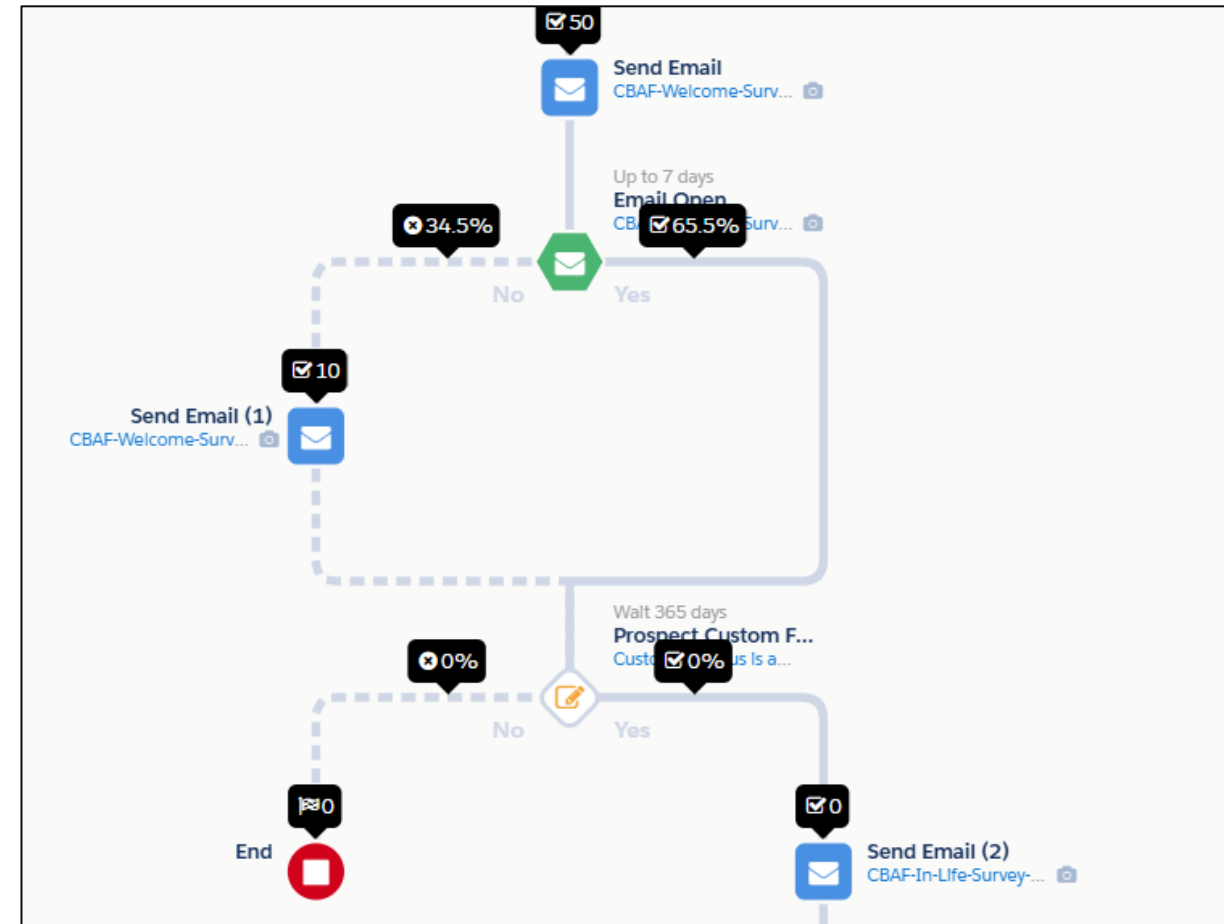
Your customer has completed a feedback survey.

Contact		
Juliet Stephenson		
Contact Owner	Phone (2)	Email
 Darshna Devi		juliet.stephenson@closebrothers.com
Primary Address		Date of Birth
United Kingdom		
Related List Quick Links		
 Opportunities (0)	 Related Accounts (1)	 Notes (0)
 Responses (10+)	 Contact History (1)	 Campaign History (0)
	 Opportunity Securities (0)	 Third Party References (0)
Responses		
10+ items • Sorted by Completion Date • Updated a few seconds ago		
Response Name	Survey	Url
1 0156	CBAF-Welcome Survey-0423	https://www.getfeedback.com/s/t6KMNgL659UancdLVGchWQ

Customer journey

In-life

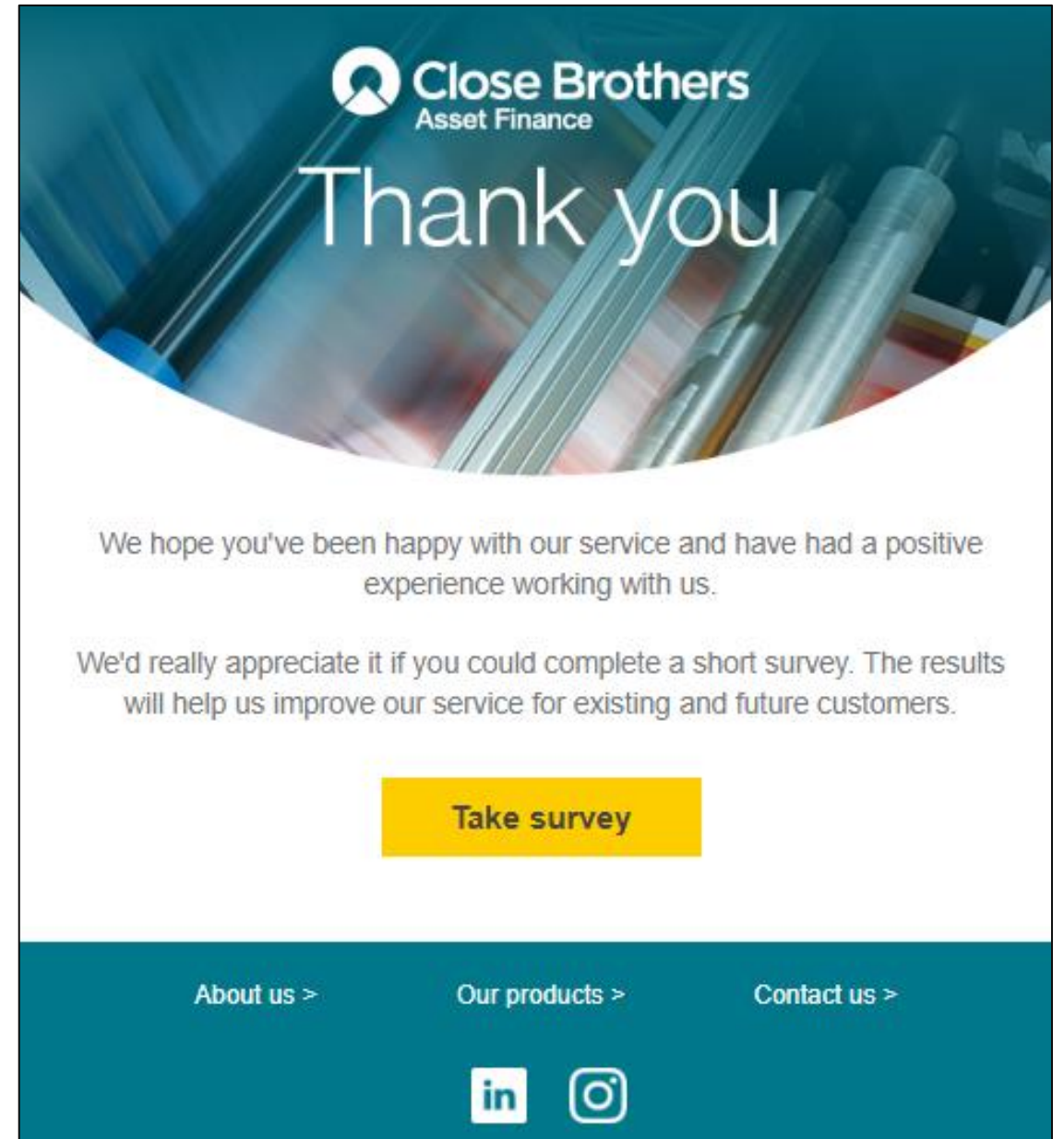
- Triggered on anniversary – countdown begins once first email is sent
- Sent each year thereafter as long as status = ACTIVE
- Links to 'In-life survey'
- Segmented by industry and brand – Portal CTA dynamic



Customer journey

End of life

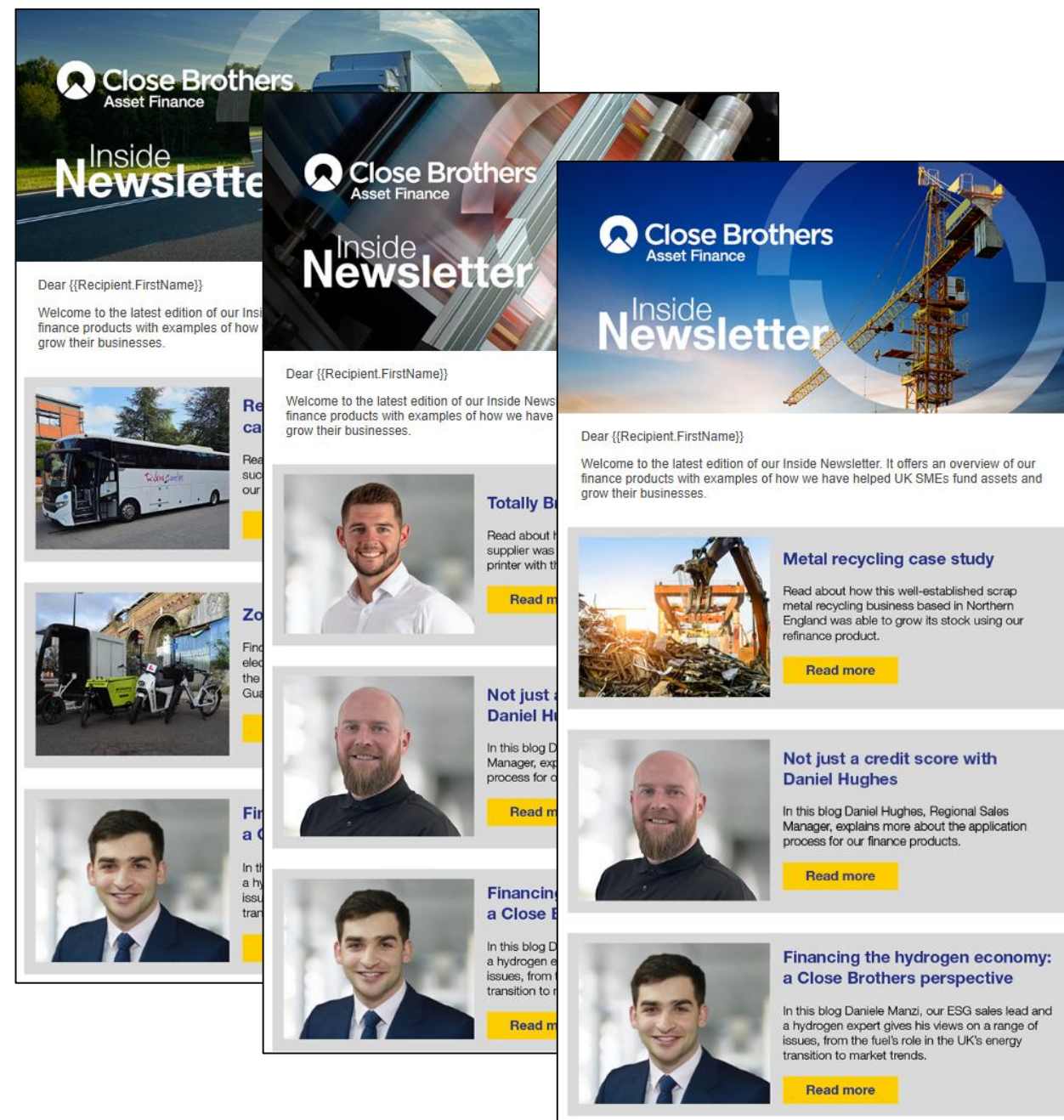
- Triggered at end of Agreement
- Sent when a customer's status = DORMANT
- Links to 'End of life survey'
- Segmented by industry and brand



Customer journey

Industry specific comms

- List emails still sent – but targeted
- Newsletters, Pre-event info, Assets for Sale
- Based on previous activity, interest and customer's industry
- Segmented by industry and brand – dynamic lists



Customer journey

Event – lead capture

- Events – Kiosk forms / emails
- Customer attends event – Lead info captured via webform
- Triggers auto-email – unique to Event
- Keeps Lead warm for the salesperson

Manufacturing - Kiosk Form

ASM *

Customer Email *

Customer First Name *

Customer Last Name *

Phone

Mobile

Company

Address

City

Postcode *

Value

Term

Event *

- Select -

Comments

I'd like to be contacted with the latest news and offers from

☐ Email

☐ Phone

☐ Mail

☐ I'm not a robot

 Privacy - Terms

 **Close Brothers**
Asset Finance

It was great to see you!

Thank you for visiting us at {{Recipient.CB_Event_c}}. A member of our team will be in touch with you shortly.

In the meantime, get to know more about us:

For more information on our finance solutions

Click here >

Discover how we have helped UK SMEs fund assets and grow their business

Case studies >

Event *

- Select -

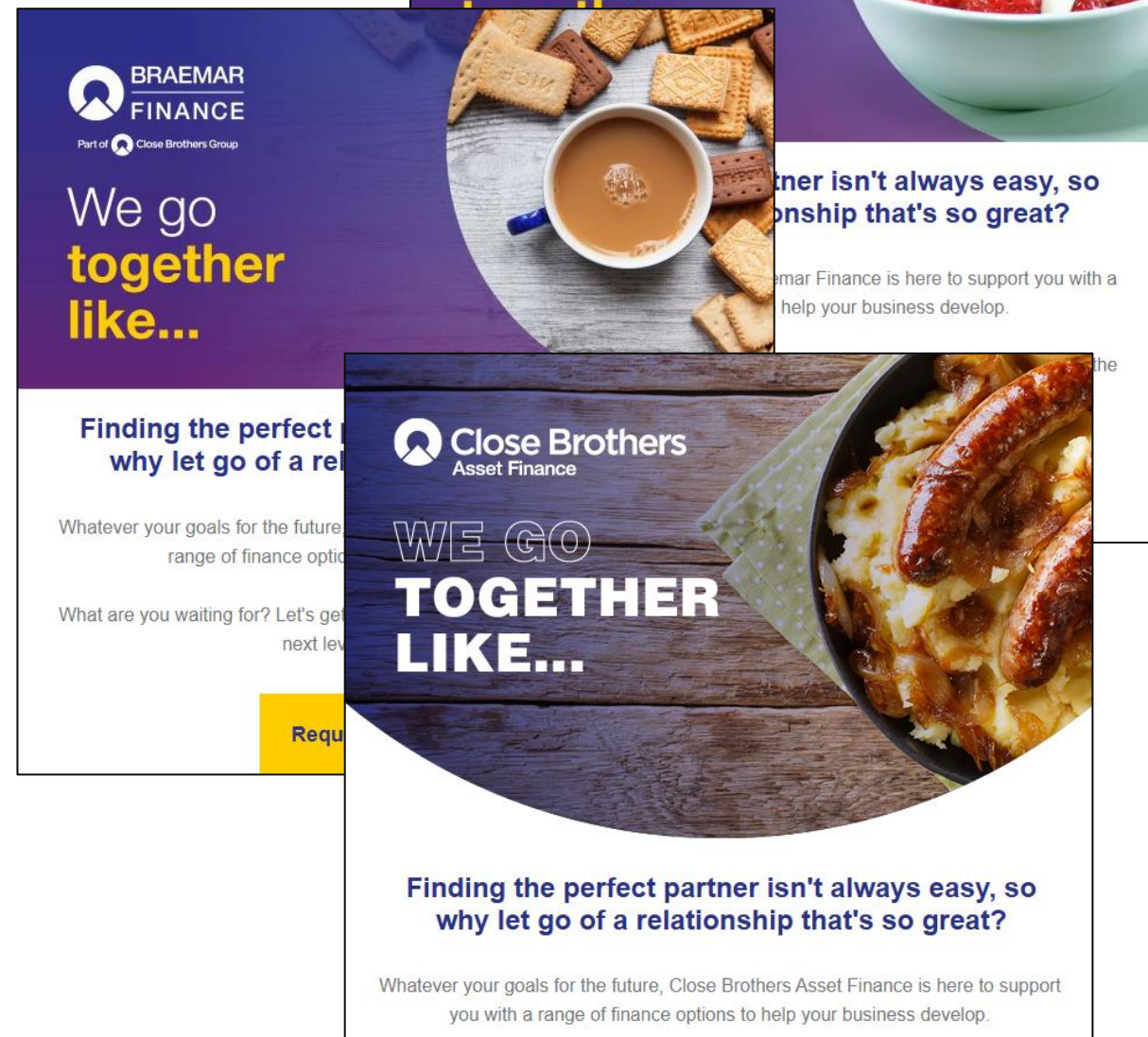
Southern Manufacturing 2026

MACH 2026

Customer journey

At risk customers

- Triggered few months before last agreement ends
- Opportunity to target current customers – re-sell our product
- Tailored to the customer's brand / industry
- Aim to generate new Lead from an existing Customer



BRAEMAR FINANCE
Part of Close Brothers Group

We go

BRAEMAR FINANCE
Part of Close Brothers Group

We go **together like...**

Close Brothers Asset Finance

WE GO TOGETHER LIKE...

Finding the perfect partner isn't always easy, so why let go of a relationship that's so great?

Whatever your goals for the future, Close Brothers Asset Finance is here to support you with a range of finance options to help your business develop.

Whatever your goals for the future, Close Brothers Asset Finance is here to support you with a range of finance options to help your business develop.

Requ

Customer journey

Dormant customers

- Triggered a year after customer's agreement ends
- Sent when a customer's status has been DORMANT for 12 months
- Attempt to re-engage customer
- Segmented by industry and brand



Customer journey

Timeline



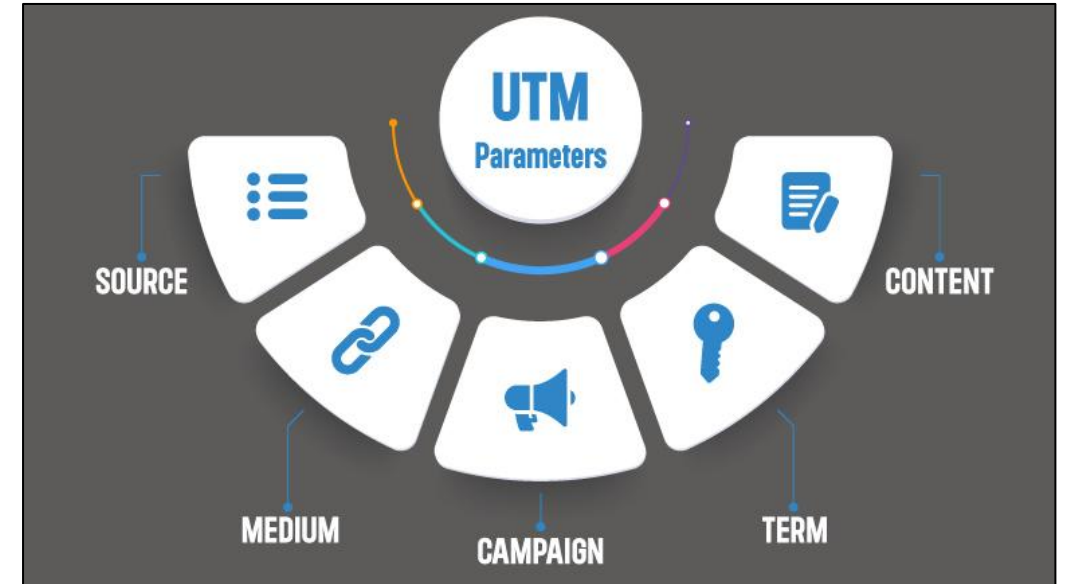
Tracking success

Reports, data and dashboards!

Tracking success

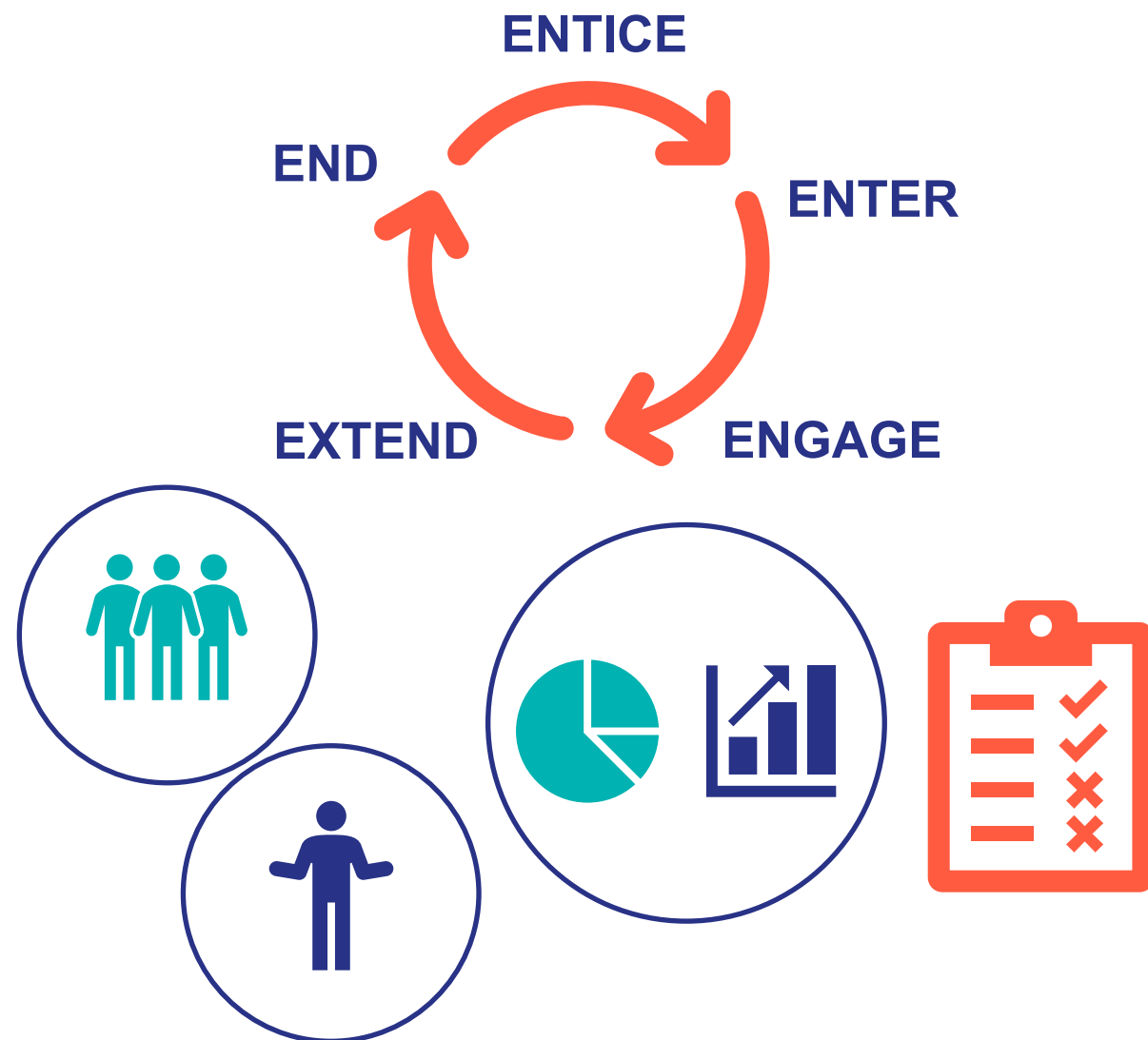
Reporting ROI

- Track usual engagement metrics – open rate, click rate, opt outs etc.
- Use UTMs to capture Source, Medium and Campaign for the last touch point
- Campaign Influence – if customer interacts with our campaign (i.e. clicks) and then an Opp is created within 90 days we say it was 'influenced by the email'



Summary

- Map out the full journey first – every touch point for your customer
- Define what data you currently have on your customers – start small and build
- Find a way to track success – how does email influence your other channels / activity?
- Test and track what works – keep learning and improving!



Thank you!