

SUCCESS STORY

Global Manufacturer
and Distributor

VALUE DELIVERED

- ✓ Helped redefine the customer's **marketing strategy** with a strong focus on measurable business value and ROI.
- ✓ Combined **strategic consulting** with deep Salesforce marketing expertise to shape the future-state vision.
- ✓ Delivered a high-value presales and discovery experience that established **OSF as a trusted transformation partner**.



OSF | DIGITAL

Transforming Marketing Operations with Data-Driven Customer Engagement

Customer Profile

Our customer **serves clients across multiple industries** with products, logistics, consulting, and value-added services, operating across numerous locations worldwide.

Challenge

- ✓ Had Marketing Cloud Next and Data 360, but the **platforms weren't fully implemented** with optimizations and best practices.
- ✓ Used Pardot for **customer engagement**, focusing on lead generation and sales enablement.
- ✓ Wanted **advanced marketing capabilities** for better campaign outreach and more effective customer journeys and touchpoints.

Outcome-Driven Solution

- ✓ Evaluated and redefined the **marketing execution strategy**.
- ✓ Designed the future-state **Marketing Cloud Next** and **Data 360** solution. Design use cases:
 - Account-Based Nurture by Vertical and Buyer Stage.
 - Packaging Consultant Enablement & Sales Signal Alerts.
 - Event & Trade Show Lead Nurturing and New Customer Onboarding.
- ✓ Created **data-powered customer journeys** that personalize each touchpoint, score leads, and **automate campaigns**.
- ✓ Future phases include **Marketing Cloud Next Agents**, such as:
 - Journey decisioning agent.
 - Campaign creation agent.
 - Content creation agent.

- ▶ **Personalized interactions**
Tailored customer journeys and engagement across the buyer lifecycle
- ▶ **Intelligent marketing foundation**
Automated campaign execution, lead scoring, and marketing operations

PRODUCTS

Data 360

Marketing Cloud Next

Customer Adoption

- ✓ Engaged stakeholders through discovery workshops **and future-state planning** to align marketing strategy and execution.
- ✓ Established a roadmap for adopting modern **customer journey orchestration**, automation, and data-driven engagement practices.
- ✓ Created a foundation for broader use of **AI-driven campaign**, content, and journey management capabilities.