

SUCCESS STORY

Leading Global Utility and Energy Company

VALUE DELIVERED

- ✓ Deep discovery and understanding of business challenges enabled OSF to define a strategy focused on **maximizing business value**.
- ✓ Strong Salesforce Data 360 and Marketing Cloud expertise helped establish a **scalable customer data foundation** and practical activation roadmap.
- ✓ OSF combined technical implementation, business consulting, **use-case prioritization**, training, and change-management support to drive long-term success.



OSF | DIGITAL

Enabling Data-Driven Customer Engagement Through a Unified Customer Data Foundation

Customer Profile

The organization serves residential, commercial, and enterprise customers and focuses on **delivering energy solutions globally**.

Challenge

- ✓ Customer data was distributed across multiple platforms, business units, data models, and identifiers, limiting the ability to create a **unified customer view**.
- ✓ Marketing teams faced **inefficient campaign execution** processes and wanted greater independence when working with customer data.
- ✓ The organization sought to **improve personalization**, enable data-driven marketing, and increase process automation across teams.

Outcome-Driven Solution

- ✓ OSF designed a customer data and engagement ecosystem powered by **Salesforce Data 360 and Marketing Cloud Engagement**.
- ✓ Integrated new solutions with existing cloud data sources.
- ✓ **Unified customer profiles**, enabled audience segmentation, supported personalized communications, and laid the foundation for scalable, automated customer engagement journeys.
- ✓ Provided integration enablement, implementation support, **roadmap development**, and user training.

Customer Adoption

- ✓ Marketing and customer engagement teams were enabled to **use unified customer data** through a more accessible interface.
- ✓ OSF identified initial and future use cases, created an adoption roadmap, and delivered **training and dedicated support** to accelerate platform utilization and reduce implementation risk.
- ✓ The solution supported **multiple customer communication journeys**, including onboarding, service communications, and billing-related interactions.

- ▶ **Unified customer profiles**
Personalized engagement and improved segmentation
- ▶ **Efficient campaign delivery**
Highly automated campaign execution and delivery + time-to-market
- ▶ **Increased loyalty**
Improved customer communication and satisfaction
- ▶ **Scalable data architecture**
Reduced manual effort, fewer data inconsistencies

PRODUCTS

Data 360

Marketing Cloud Engagement