

SUCCESS STORY

Manufacturer of
Premium Oil and
Automotive Products

VALUE DELIVERED

- ✓ Combined **strategic consulting** with deep Salesforce expertise to bridge business transformation and technology execution.
- ✓ Helped the customer identify opportunities to **improve customer service**, data management, customer experience, and marketing effectiveness.
- ✓ Built **executive alignment** and stakeholder buy-in through workshops, roadmap planning, and business-case development.
- ✓ Delivered a **scalable vision for customer data**, personalization, loyalty, and long-term digital growth.



OSF | DIGITAL

Leaning on Digital Strategy, Unified Data, & Personalized Engagement for a Customer-Centric Business

Customer Profile

Our customer is an **MAE leader with an extensive distribution network** and global market presence. They operate multiple distribution centers, serve customers through a dealer ecosystem, and support both direct-to-consumer and business channels.

Challenge

The organization operates a **complex technology landscape** supporting commerce, marketing, customer service, and data-driven operations across a global footprint.

- ✓ Create a more connected, **customer-centric experience** across digital and service channels.
- ✓ Address **fragmented customer data** and disconnected customer views that limited sales, marketing effectiveness, and customer experience initiatives.
- ✓ **Improve personalization** capabilities and enable cross-selling opportunities across customer segments.
- ✓ Reduce manual processes and **improve engagement** with customers and dealer networks.
- ✓ Establish a **clear technology roadmap** and data foundation capable of supporting future growth, loyalty initiatives, and marketing transformation.

Outcome-Driven Solution

- ✓ OSF partnered with the customer to define a future-state **digital transformation vision**.
- ✓ Assessed their technology ecosystem and developed a **strategic roadmap for modernization**.
- ✓ Helped shape a customer data and marketing transformation **centered on Data 360**.
- ✓ Migrated **existing Pardot to Marketing Cloud Next** and handled SMS migration.
- ✓ Handled customer data discovery, platform modernization, **marketing migration initiatives**, and loyalty strategy planning.

Customer Adoption

- ✓ Business and technology stakeholders participated in **collaborative workshops** and strategic discovery sessions to align around a long-term vision for customer engagement and data management.
- ✓ OSF helped establish organizational alignment through roadmap development, investment guidance, and **business-case creation**.
- ✓ The transformation initiative encouraged **broader adoption** of customer-centric processes, data-driven marketing practices, and personalization strategies across teams.

- ▶ **Prioritized tech investment**
Digital transformation initiatives & a strategic roadmap aligned to long-term business objectives
- ▶ **Increased cross-sell, upsell, & loyalty**
Customer-centric marketing and service experiences through a unified data foundation
- ▶ **Accelerated revenue and decision-making**
Improved digital performance, sales effectiveness, and customer intelligence

PRODUCTS

Data 360

Marketing Cloud Next