



## Data to Dollars: Transform Financial Sector with Data Cloud

---



**Ekaterina  
Obolenskaya**  
FLO,  
Marketing Automation  
Practice Manager



**Cyril  
Louis**  
Mavericx,  
CEO & Co-Founder

# Thanks To Our Incredible Sponsors

**SERCANTE**  
A Trilliad Company



**TRILLIAD**  
A Growth Services Provider

**stensul**

**storylane**

  
**Trailblazer**  
COMMUNITY

 **AuctusIQ**

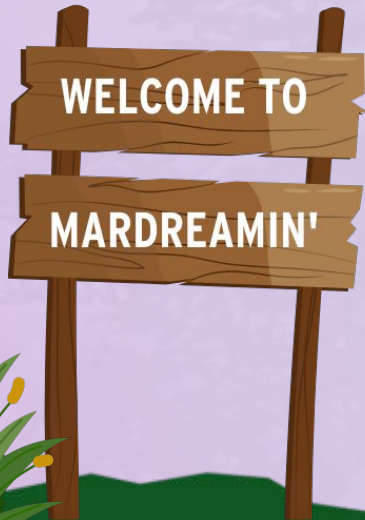
**JU  
ST**

**SANDLER**

# Thank You Our Amazing Attendees!



# Agenda



- **The Marketer's Struggles**
- **Two-Part Solution**
- **Data Cloud for Marketers**
  - **Architecture**
  - **Connect > Activate**
- **Data Cloud for Financial Institutions**
  - **Financial Services Marketing Challenges**
  - **Use Cases for Financial Institutions**

# MARKETERS

are struggled with...



**Lack of Unified  
Customer View**



**Inability to Personalize  
Offers Effectively**



**Difficulty in Making  
Data-Driven Decisions**



**Challenges in Measuring  
Marketing ROI**



# Inefficient Targeting in Marketing

# 78%

of marketing campaigns were **not effectively targeted due to incomplete customer profiles**, resulting in a significant reduction in customer engagement and conversion rates\*.

\*Revealed by a survey of the marketing team.



# Two-Part Solution

## DATA

We focus on unifying and optimizing your customer data to ensure it's **accurate**, **accessible**, and **actionable**.

## MARKETING

We leverage this unified data to craft **personalized marketing campaigns** that resonate with customers.



# Data Cloud for Marketing

## Data Harmonization

Harmonize data sources

Know your customer better

Go beyond marketing data

Build unified customer profiles

## Data Segmentation

Discover new segments

Segment more precisely

Single place for segmentation

Calculated Insights

## Data Activation

Empower 1:1 personalization

Avoid irrelevant messaging

Drive customer engagement

Target and scale

## Data Insights

Explore your data

Democratize customer insights

Use the power of analytics

Trends over time

## Values

Resolve identities from multiple sources to build a single source of truth

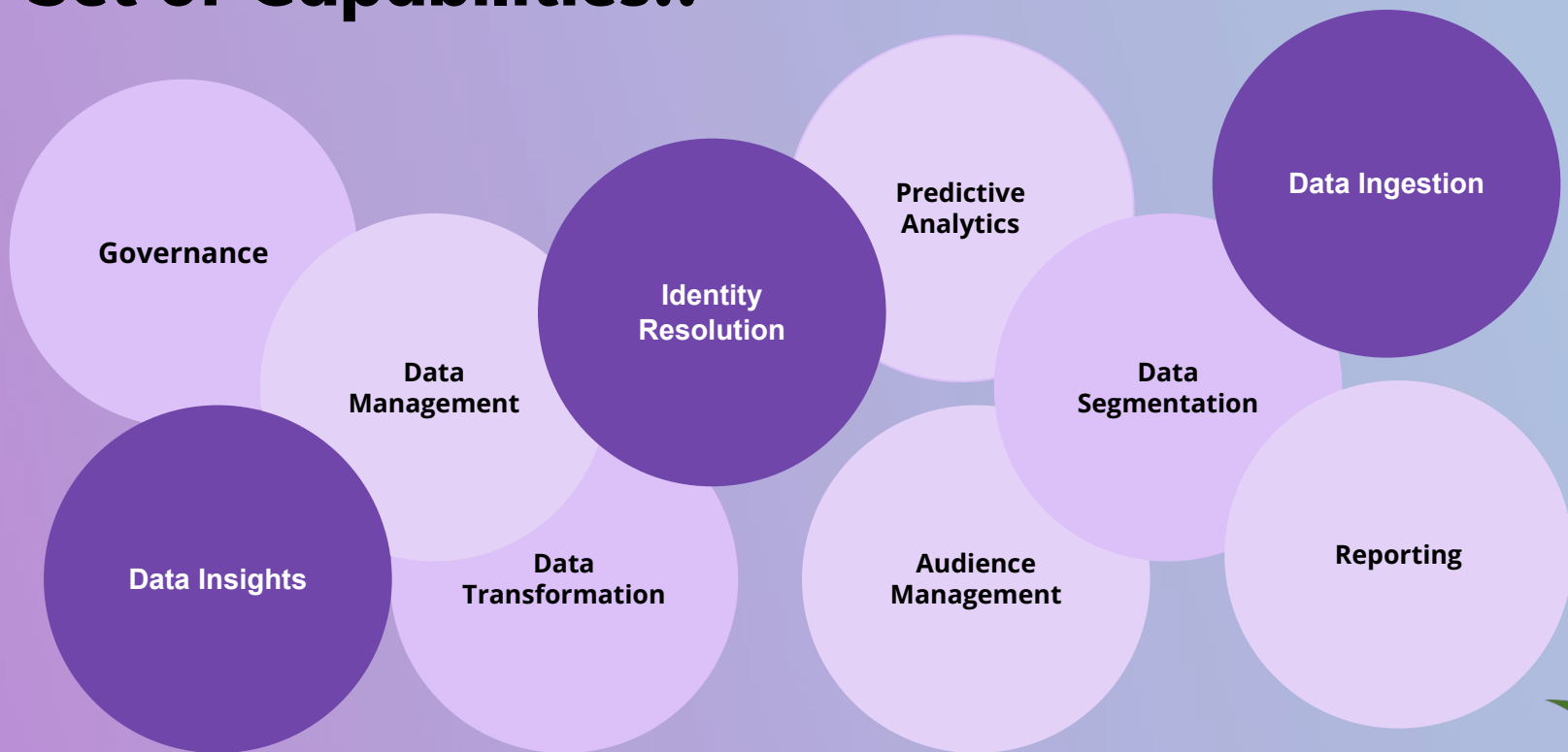
Group individuals to improve data efficiency and benefit from digital sustainability

Share audiences to empower personalized experiences across all touch points

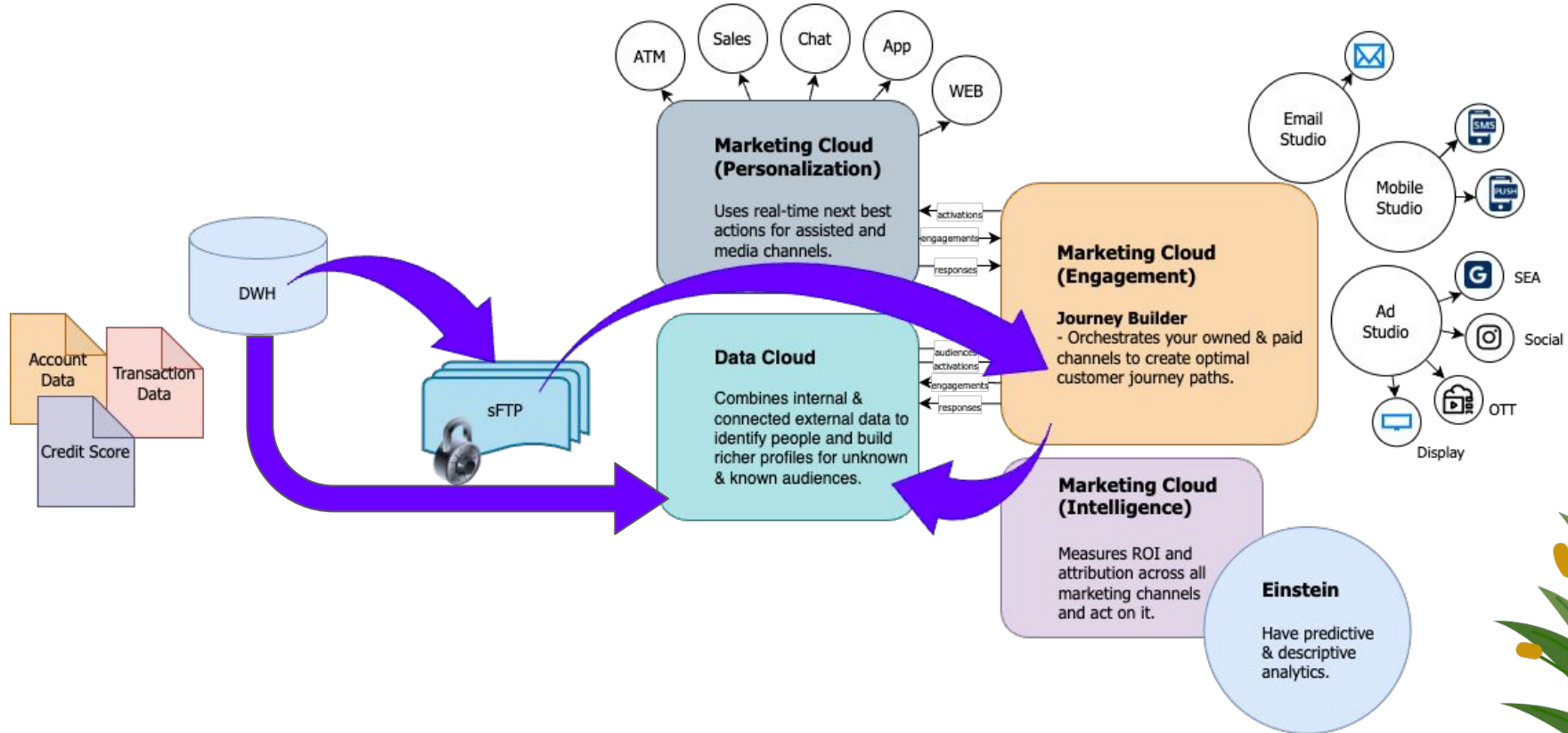
Use harmonized data to more accurately understand your customer and their business impact



# Set of Capabilities..



# Connecting the Clouds



# From Connection to Activation

.....  
: Data Cloud steps in here  
.

Data  
Analysis

Data  
Preparation

Data Sources  
Definition

Data  
Ingestion

Data Modelling  
&  
Transformation

Data  
Segmentation

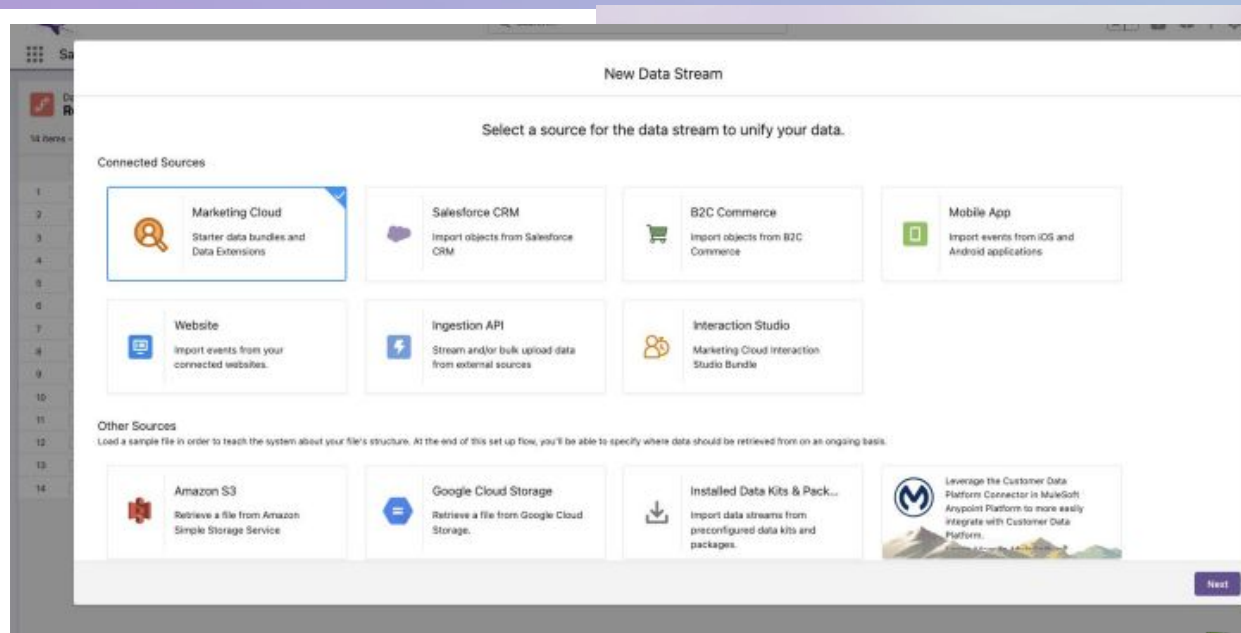
Data Activation

Data  
Insights



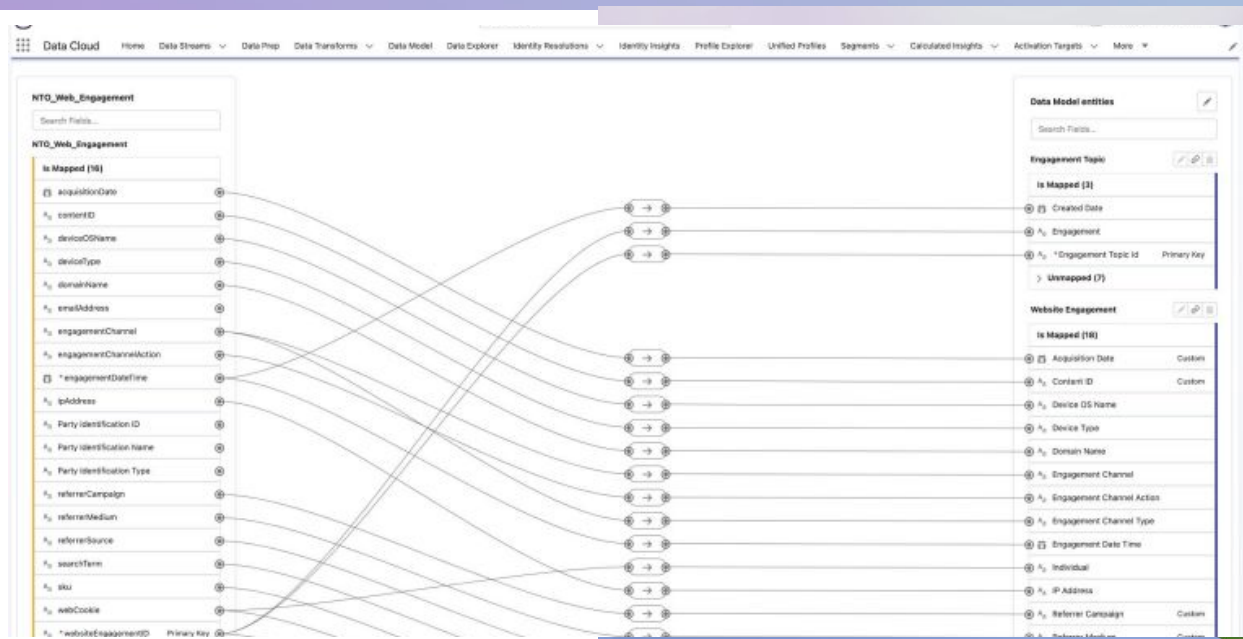
# Data Ingestion

With Data Cloud **Data Streams** we ingest data securely from sources like: Financial Services Cloud, Marketing Cloud Engagement, Web Analytics, Mobile App, transactional systems, etc.



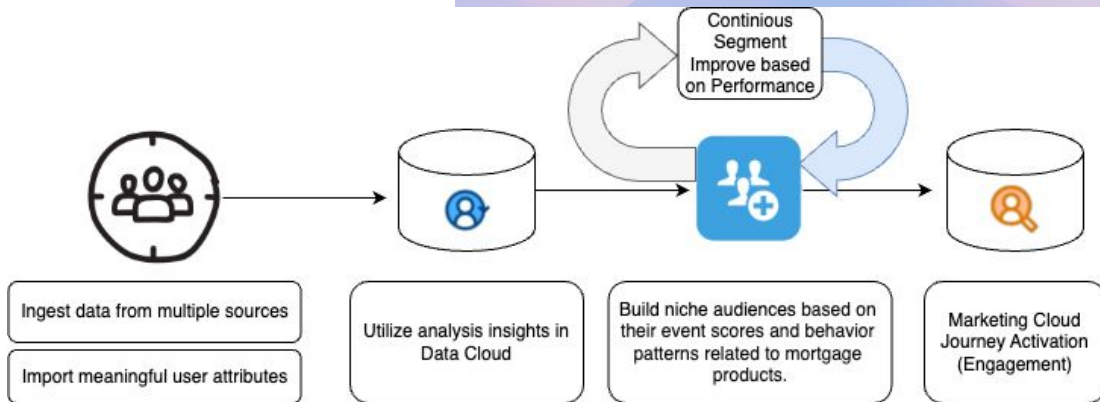
# Data Modelling

In Data Model we **harmonize** data across data silos that will help us further to build unified customer profiles using click-based UI. Looks easy? The key is knowing **what** to connect with **what**!



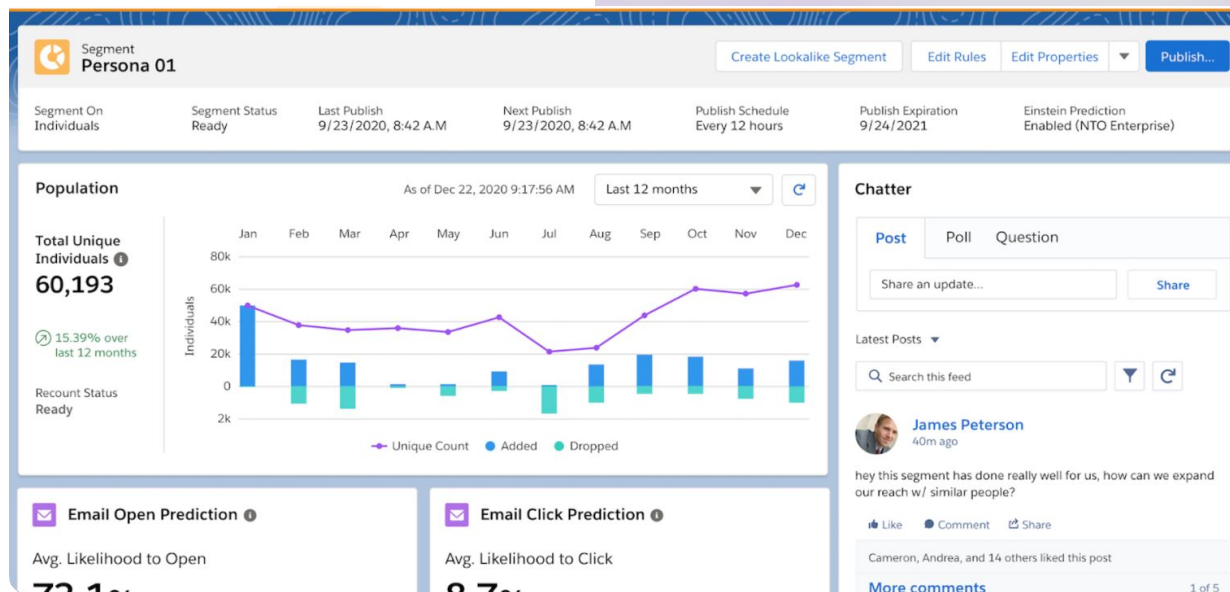
# Data Segmentation + Activation

Data Cloud is leveraged to also create segments based on customer **event scores** and **behavior patterns** related to specific financial products. After we can activate the prepared segments in Salesforce Marketing Cloud Engagement for personalized marketing campaigns.



# Data Insights

With **Data Insights** we can leverage **AI-driven** insights that can help to identify cross-selling opportunities, predict churn, and support personalized financial product recommendations.

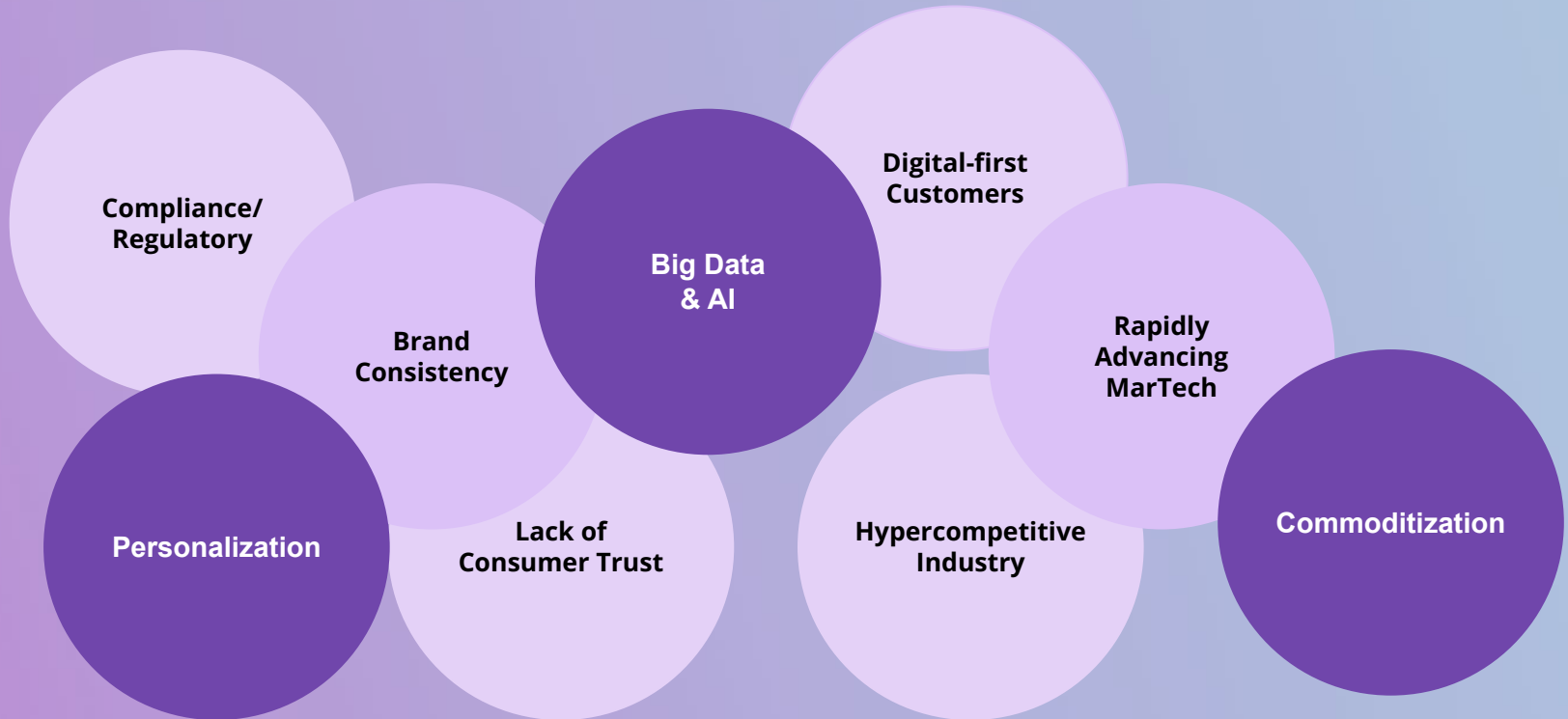


# What Can Financial Institutions Do With Data Cloud?





# Financial Services Marketing Challenges



# Personalization Gap

Only

# 31%

of marketers in financial services feel they **effectively leverage customer data** to **personalize offers**\*.



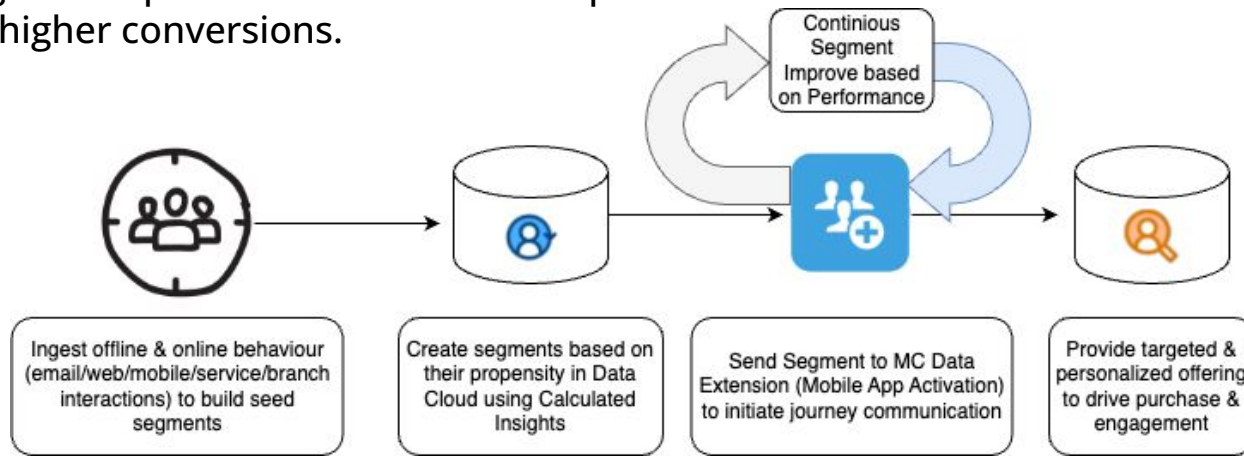
\*Adobe Research

# Use Case 1

## Enhancing Investment Product Targeting

Using Data Cloud segmentation capabilities, the bank, that offers several investment products but struggles to personalize offers, can create dynamic customer segments based on unified data and investment behavior.

Targeted campaigns with personalized investment products lead to better customer engagement and higher conversions.



**“PERSONALIZATION IS THE KEY TO  
CUTTING THROUGH THE NOISE  
AND MAKING A MEANINGFUL  
CONNECTION WITH CUSTOMERS.”**

ANGELA AHRENDTS

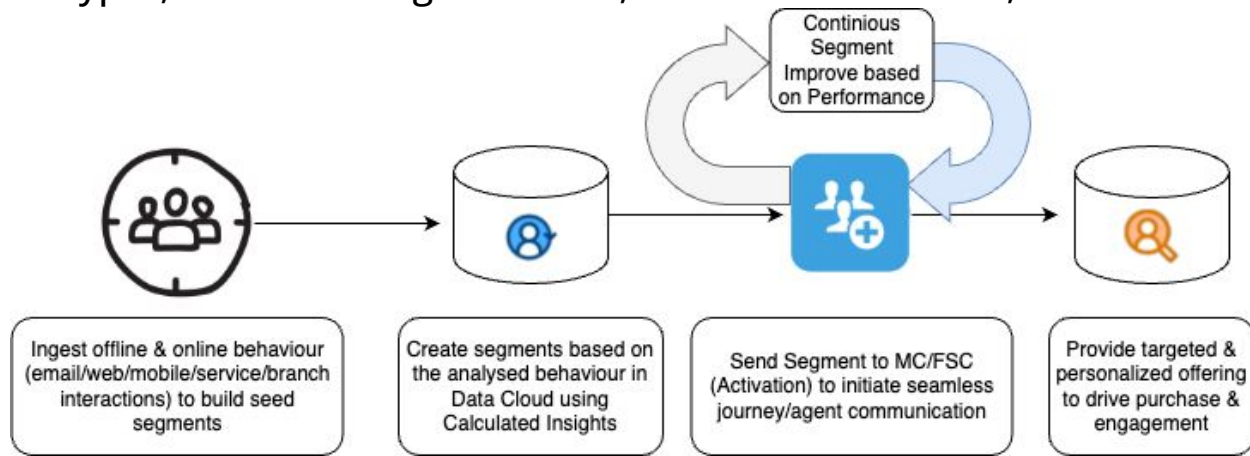


# Use Case 2

## Predictive Account Type Selection

Develop a predictive analysis system to determine the types of accounts customers are likely to opt into. It will leverage past behavior and events to make informed predictions and drive decision-making for personalized marketing strategies.

This analysis will enhance the marketing ability to deliver tailored communication and offers for different account types, such as savings accounts, investment accounts, and more conversions.



# So, Data Cloud...

- Provides a unified, omnichannel customer view, enhancing efficiency and reducing time spent across teams.
- Eliminates organizational silos, fostering collaboration between teams and departments.
- Enhances marketing effectiveness through highly targeted and personalized customer experiences.
- Increases customer lifetime value by nurturing deeper, more engaging relationships.
- Empowers marketers to leverage large data sets without the need for dedicated data analysts.

# Let's connect!



**Thank You!**







# Welcome, Speakers!

The MarDreamin' Team would like to thank you for your participation in this incredible event. It is because of you that we are able to provide a global community of Marketers with the best tips and tricks in the world of Salesforce and marketing automation.

This year our theme is **"Trailblazing The Future Of Marketing - Together!"**. As you develop your deck please use this template and theme to ensure you align with the spirit of this presentation.

Year after year we are amazed by our wonderful community and their willingness to support others. Sharing our knowledge is one of the key goals for this event.

We understand that by doing so we are the next generation of Trailblazers and adding our grain of sand as we develop the future of marketing - together!

Whether you're joining us from the states, the United Kingdom or even Australia we welcome you to this event and hope you share our enthusiasm.

Again, thank you for your time and for sharing your gift with others.

**You're all incredible trailblazers!**

If you have any questions please don't hesitate to reach out to us.

# Presentation Guidelines - Structure

- Select and fill out the “Title/Speaker” slide(s)
- Include the “Thanks to Our Sponsors” slide
- Create an “Agenda” slide. List concepts you will discuss in a bulleted list. Each point should become its own section
- Develop the bulk of the content and utilize section breaks
- Create a “Summary” slide. Briefly summarize approximately 1-3 points you want attendees to walk away with. The fewer and more succinct points, the better they will be remembered.
- Include the “Thank You” slide. Field questions at this time, if applicable.

# Presentation Guidelines - Content Tips

- **Open strong.** Begin with a compelling hook that captures attention such as a thought-provoking question, a relevant statistic, a surprising fact, or a relatable anecdote.
- **Hold interest.** Incorporate stories, examples, and live demonstrations whenever possible. If applicable, personalize the presentation by inviting attendees to share their own experiences.
- **Instill credibility.** Support your points with credible data and evidence to help attendees trust the content. This can include your own firsthand accounts of what you've seen succeed (or fail).
- **Address pain points.** Identify common challenges your attendees face and provide solutions.
- **Limit distractions.** Adhere, or get close, to the following limits to help attendees listen more attentively and focus on what is most important.
  - 1 central idea per slide
  - 2 minutes per slide
  - 4 bullet points per slide
  - 8 words per bullet point

# Steps

Item 1

Item 2

Item 3

Item 4



# Title

Body copy



# Title

Body copy



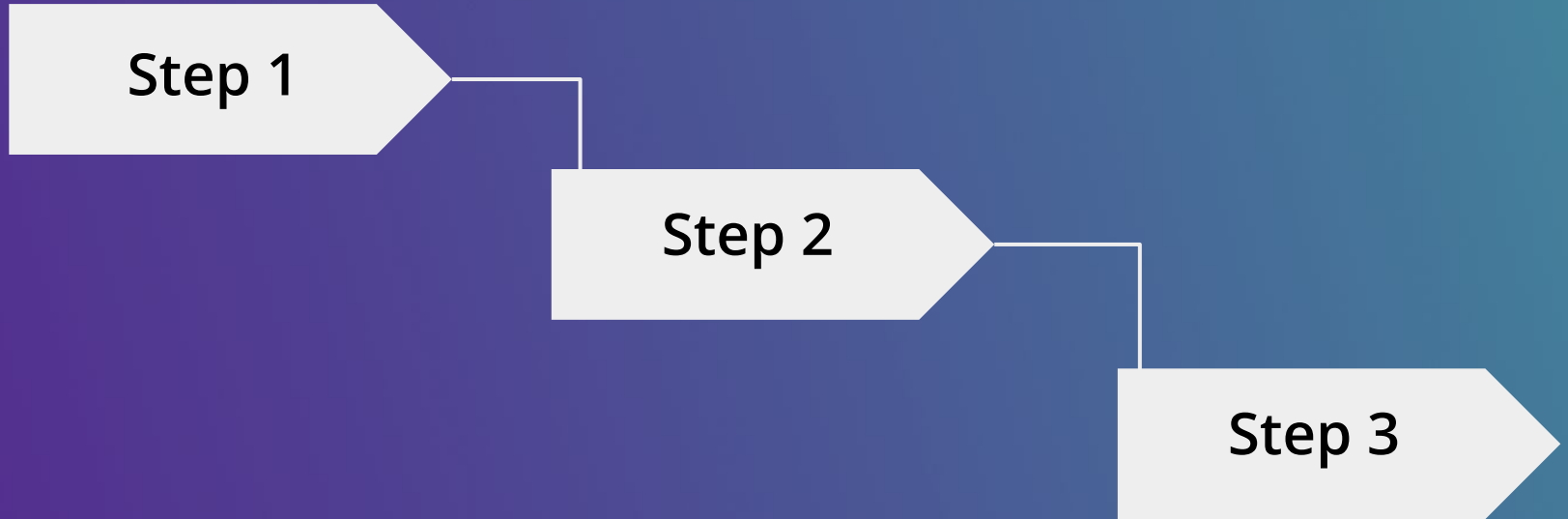
# Title

Step 1

Step 2

Step 3

# Title







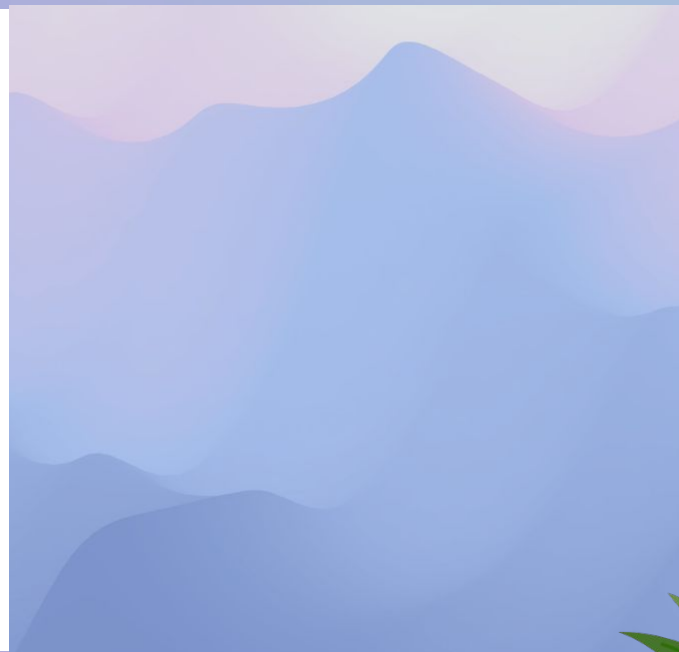
# Title

Body copy



# Title

Body copy





# Title

Body copy

# Title

Step 1

Step 2

Step 3

# Assets - Logo



# Assets - Icons



# Assets - Icons

