



MARKETING AND PERFORMANCE

# Salesforce Self-Service Marketing Campaign Management

## Enhance the Customer and Member Experience at Banks and Credit Unions

Many financial services institutions with limited marketing resources struggle to execute targeted, personalized campaigns that effectively engage both new and existing customers. Perficient's Salesforce self-service marketing campaign management solution enables marketing teams to leverage customer data and segment audiences by line of business, existing products, or whitespace indicators to create campaigns that deliver measurable results.

## Solution Overview

Powered by Salesforce Marketing Cloud and Experience Cloud, our solution seamlessly scales from mid-market to enterprise banks and credit unions. Over a 16-week engagement, we help you:

- Select customer segments based on specific criteria
- Personalize content using user profile attributes and preferences
- Retrieve customer data from multiple systems
- Access regulatory-compliant digital assets
- Prioritize lead management activities
- Measure results with comprehensive dashboards

## Key Benefits

- Gain a 360-degree view of customer interactions
- Boost customer loyalty and drive conversions
- Increase your buying influence
- Implement personalized marketing tactics
- Launch regulatory-compliant micro campaigns to target local opportunities or centers of influence

## Why Perficient

We're an Enterprise Salesforce Partner excelling in CRM, data, AI, and personalization. For more than 15 years, we have built industry-specific Salesforce solutions that help Fortune 1000 organizations enable data-driven decisions and deliver personalization at scale.

- Expert Marketing Cloud Partner
- 1400+ certifications
- 580+ projects
- 4.8/5.0 CSAT score



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