



Discover tested methodologies that can help you get the most from your investment in Salesforce Customer Data Platform (CDP)

At KPMG, our goal is to help strengthen your company’s capacity to thrive in highly disruptive environments. We understand that one of the main issues faced by marketers today is knowing and segmenting their customers well enough to provide unique and personalized experiences that redefine how they interact with your business at every touchpoint.

Marketing has undergone exceptional transformation in recent years, and the relationship between customers and brands has evolved significantly. That relationship is now guided by the proliferation of smart devices, the far-reaching presence of technology, and a culture of 24/7 connectivity that has given rise to a new set of business challenges.

Marketers’ top challenges can impact companies’ current and future performance

In today’s online marketing landscape, businesses are continually engaging customers with personalized, cross-channel messaging globally. But, in order to sustain this practice, businesses need unified customer data and identity resolution to engage customers with personalized content at scale.

Salesforce CDP helps unify all of your customer data enabling a complete view of your customers

Salesforce CDP helps businesses build unified customer profiles, enable a single source of truth matching both known and unknown customer data, and activate personalized experiences by connecting to Marketing Cloud, Sales Cloud, Service Cloud, and a variety of external platforms.



53% of customers now expect the offers they receive to always be personalized¹

70% of executives cite external data availability, operational data quality and operational trust as challenges to using data to drive new business models²

72% of marketers are not satisfied with their ability to engage customers across channels at scale³

Marketers’ top challenges

- Personalize cross-channel interactions across segments
- Enable single source of truth for customer data and consolidation of data silos across the organization
- Match customer data to a person

Citations: (1) “State of the Connected Customer”, Salesforce, October 2022 (2) “The Virtual Enterprise: The Cognitive Enterprise in a virtual world.” IBM Institute for Business value, May 2021 (3) “Introducing the 7th Salesforce State of Marketing Report: Here Are the Top Trends Redefining the Profession”, Salesforce, December 2018.

KPMG can help companies adopt and effectively use Salesforce CDP

We have a defined, tried, and tested Salesforce Delivery Model. We use an agile approach, customized based on the client/industry, to retain flexibility and nimbleness as we work through Salesforce CDP planning and configuration. We aim to strike the right balance between efficient and effective agile delivery and quality safeguards and controls.

Advisory – Strategic guidance and planning for Salesforce CDP implementations, discovery, gap analysis, roadmap creation, and design.

Data ingestion & modeling – Connect Salesforce CDP to customer data sources and map to enable a single source of truth.

Identity resolution – Unify customer data through identity resolution by matching customers to a known person.

Segmentation & activation – Segment customers and activate personalized cross-channel experiences in Marketing Cloud, Sales Cloud, Service Cloud, etc.

We also understand how hard it is to deliver successful change within a marketing team so we offer a tried and tested, people-centric approach to end-user enablement and training. Our deep understanding of Marketing Cloud products will help companies use these products to maximum effect.

Customer 360

Marketing cloud engagement

Marketing cloud intelligence

Salesforce CDP

Advertising studio

Marketing cloud personalization

Marketing cloud account engagement

The KPMG difference

We go beyond initial strategy and implementations to long-term optimization, analytics, campaign management, additional channels, and other offerings to help ensure Salesforce CDP is being used to its fullest potential.

Focus on success – We're focused on driving business outcomes and best-of-breed marketing strategies, not just IT implementations.

We lock arms – Our approach is to collaborate and work with you rather than simply execute.

Salesforce CDP #1 – We know Salesforce CDP and we'll help you avoid common pitfalls and help ensure a successful outcome.

Accelerators – Our tested methods, assets, and tools accelerate benefits and value.

Value-focused solutions

Our clients can expect value-focused, performance-driven solutions to help solve their marketing challenges. We know with the right design and implementation strategy, companies can enhance customer experience and drive profitable growth. Companies effectively using Salesforce CDP provide their customers with unparalleled customer experience across channels, customize their interactions with customers according to their real-time behaviors, and realize a better return on marketing spend.

Contact us

For more information on how KPMG can help you maximize your investment in Salesforce CDP, talk to us today.



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