

**brillio**

salesforce

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# Marketing ROI Acceleration

Transforming Customer Experiences Through  
Intelligent Marketing Automation



Today's marketing organizations face mounting challenges - from fragmented data and ineffective segmentation to limited personalization and disconnected multi-channel experiences. Poor system synchronization and inaccurate lead scoring further hinder their ability to deliver timely, relevant, and high-converting campaigns.

Brillio helps enterprises overcome these hurdles through end-to-end transformation across the Salesforce Marketing Cloud (SFMC) stack. By combining strategic guidance, technical depth, and customer-centric design, we unlock the full potential of marketing investments - driving measurable impact and personalized engagement at scale.

## Transformation

Our transformation services focus on reinventing marketing and customer experience by aligning technology with business outcomes. We work closely with clients to elevate engagement, streamline customer journeys, and deliver personalization at scale, laying the foundation for long-term marketing success.

## Implementation

Brillio provides deep implementation expertise across Salesforce Marketing Cloud and its adjacent tools. We guide clients through platform onboarding and migration, including seamless transitions from legacy systems such as Eloqua and Marketo to SFMC. Our team enables Social Studio integration, ensuring social media engagement is embedded within marketing workflows, and implements Einstein Studio to infuse AI-driven intelligence across campaigns. Mobile accessibility is also a key priority, with tailored solutions that enhance reach and responsiveness across mobile platforms.

## Health Assessment & Advisory

We offer robust health assessments for existing SFMC implementations to help clients optimize performance and identify gaps. This includes technical configuration reviews, custom development evaluations, and competitive benchmarking. Brillio's experts also deliver tailored advisory services, offering insights to maximize platform efficiency and ROI while aligning to industry best practices.

These insights are further amplified with Tableau dashboards, giving marketing leaders continuous visibility into campaign health, adoption, and ROI performance.



## Strategy & Service Offerings

Brillio helps organizations chart their digital maturity roadmap and transformation journey. Our strategic services encompass competitive analysis, benchmarking, and value modeling to uncover opportunities for improvement and growth. We support change management and organizational alignment, while crafting enterprise-wide digital strategies. Key offerings include SFMC re-platforming, large-scale personalization, customer journey optimization, content and asset streamlining, and comprehensive digital health assessments - ensuring every solution is scalable, measurable, and future-ready. With Tableau as the analytics backbone, clients can benchmark marketing maturity, track ROI against strategic goals, and uncover actionable insights that guide future investments.

## What You Gain

- **30%** improvement in customer engagement through hyper-targeted content
- **25%** increase in conversion rates via automated journeys and workflows
- **20%** revenue growth through upselling, cross-selling, and improved ROI
- **15%** efficiency gains from streamlined, automated campaign management

## Campaign Personalization Framework

Brillio's campaign personalization framework empowers marketing organizations to leverage rich customer data and deliver dynamic, tailored campaigns across the lifecycle - from segmentation to optimization. The journey begins with **customer segmentation**, where we help brands develop a unified customer view that captures individual behaviors, preferences, and history. This foundational insight sets the stage for precise targeting.

In the **planning and design phase**, Brillio supports the creation of highly relevant offer structures and campaign strategies tailored to audience micro-segments. From there, **execution** is automated using robust tools like Salesforce and Optimizely, streamlining campaign setup, A/B testing, and control strategies. We then provide a **measurement** console that gives real-time visibility into performance via customized dashboards. Finally, our **AI-powered optimization engine** continually refines campaigns, ensuring better outcomes through intelligent product and content recommendations - all integrated within a single source of truth.

## Insights & Analytics with Tableau

Brillio extends campaign execution with a powerful insights layer powered by Tableau. By integrating Salesforce Marketing Cloud data with Tableau's advanced visualization and analytics capabilities, we empower marketing organizations to measure what matters the most - engagement, conversion impact, and ROI.



### Key capabilities include:

- Unified dashboards combining SFMC, Sales Cloud, and external data for a 360° marketing performance view.
- KPI tracking across engagement, conversion, retention, and campaign efficiency.
- Advanced cohort, funnel, and attribution analysis for deeper audience insights.
- Predictive analytics to identify at-risk segments, optimize spend, and uncover growth opportunities.

This insights layer ensures marketing investments are not only automated but also measured, optimized, and continuously improving.

## Implementation Leading Practices

Brillio ensures that Salesforce Marketing Cloud implementations are future-ready and optimized from day one by following proven best practices across all key components.

In the **account setup** phase, we ensure data accuracy and platform readiness by configuring accelerators, FTP automations, validation processes, and user permissions. We maintain system hygiene with dual admin controls and setup alerts for SAP integrations.

Within **Email Studio and Content Builder**, we focus on organizing assets with a clear folder structure and streamlined naming conventions. Our teams import only essential content, host media assets for optimal load times, and apply AMPscript personalization when appropriate. We also help avoid performance lags by steering clear of slow SSJS scripts.

From a data management perspective, Brillio ensures secure and scalable practices, using primary keys, TLS protocols, and logically structured extensions. We enable robust API integrations and adopt naming best practices for campaign clarity.

For journey builders, we ensure each journey is goal-oriented, focused on singular business outcomes, and aligned to best practices in contact management. Our frameworks include entry/exit criteria, optimized branching logic, and journey caps for better orchestration.

On the analytics front, we enable advanced reporting through customized templates, historic data tracking, and URL safeguards to prevent privacy breaches. Our teams help identify KPIs and deliver actionable insights through Discover reports and data extensions tailored to business needs.



With Tableau integration, these insights are elevated into interactive, executive-ready dashboards that track ROI and performance across channels in real time.

## Brillio's Migration Strategy

Brillio's structured migration strategy enables organizations to modernize their marketing technology stack with minimal disruption and maximum impact. It is designed around three core phases: Assessment, Readiness & Planning, and Migrations at Scale.

During the assessment phase, we conduct migration readiness checks, architecture analysis, business impact evaluations, dependency mapping, and risk assessments. We define total cost of ownership, document high-level effort estimates, and align stakeholders through sign-offs and team setup. In the readiness and planning stage, we prioritize apps, design target architectures, and prepare APIs for seamless integration. We assess migration governance, organizational readiness, and compliance (SPRC) while establishing automated pipelines for portfolio migration. Our approach includes hands-on training, agile readiness, and accelerator toolkits to reduce time-to-value.

Finally, Brillio's migration factory delivers phased migrations through repeatable patterns and automated validation. With wave-based execution, we scale operations securely and efficiently - ensuring that marketing teams are equipped to activate, analyze, and optimize campaigns on Salesforce from day one.

## Solution Architecture

Our architecture recommendations are built on Brillio's proven experience designing scalable, future-ready **Salesforce Marketing Cloud** solutions. This standardized yet adaptable framework supports omni-channel activation, intelligent segmentation, and seamless integration with legacy and new systems.

The architecture begins with **core user groups** - marketers, admins, sales teams, and reporting specialists- who interact with integrated systems, including social and ad networks. These data sources feed into a unified platform via real-time and batch ingestion powered by integration layers such as MuleSoft and IBM ESB.

At the heart of the architecture is the Salesforce Marketing Cloud Core, comprising Ad Studio, Mobile Studio, Journey Builder, and Email Studio - all working together to enable personalized, automated, and responsive campaigns. Brillio's model integrates Customer 360 Audiences for intelligent identity resolution and data unification, enabling marketers to activate deeply segmented journeys with precision.



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The framework includes Salesforce Sales and Service Clouds to manage account interactions, customer touchpoints, and event-based triggers - augmented by Einstein AI for lead scoring, performance insights, and conversion prediction. The solution is rounded out by conversational messaging via SF Messaging, as well as integrations with third-party platforms and partner communities for scale and collaboration.

## Proven Results Across Industries

**Global Fitness Brand:** Consolidated multiple Marketing Cloud instances, integrated with Salesforce Platform, and automated preference center management via APIs.

**Real-Estate Company:** Migrated from Eloqua to SFMC, connected social platforms for real-time campaign execution and lead creation.

**Life Sciences Provider:** Integrated SFMC with a decision support platform to guide field reps with next-best-action insights.

**Tire Manufacturer:** Unified sales processes across five units using Salesforce Sales Cloud and custom-built reporting workflows.

**Healthcare Nonprofit:** Used Pardot and Engagement Studio to personalize outreach, build Customer 360 profiles, and improve patient engagement.





## ABOUT BRILLIO

Brillio is a digital technology services company that drives AI-first engineering and design-led experiences for global enterprises. Born digital in 2014, its consulting-led services span Customer Experience, Data & AI, Product Engineering, and Digital Infrastructure. With an industry-leading NPS of 71, Brillio accelerates time to market through its proprietary BrillioOne.ai platform, powered by AI-ready talent with deep domain expertise.

Brillio is the official Digital Transformation Partner and the official Data and AI Services Provider of Atlassian Williams Racing. Brillio partners with leading technology providers including Microsoft, AWS, Google Cloud, Salesforce, Adobe, Databricks, and Snowflake and operates with 6,000+ “Brillians” across 15 global delivery centers. Consistently recognized as a Great Place to Work® since 2021, Brillio blends innovation, talent, and purpose to deliver measurable outcomes for clients and fulfilling careers for employees.



<https://www.brillio.com/>

Contact Us: [info@brillio.com](mailto:info@brillio.com)

