Kickstart Customer-Obsessed CRM – Without Starting Over

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A connected experience ecosystem will enable the Primo Vision

Experiences are **ALL** connected in the eyes of the customer.

15+ Years of Adapting & Innovating

Primo & Merkle Partnership

2010

Establish partnership
to develop connected customer experiences across digital touchpoints.

2015

SEPT
Salesforce Marketing Cloud
instance set up to manage digital messaging.

2020

COVID strikes!
Paused messaging but continued to use SFMC to support micro-sites and landing pages.

If you build it…

they will come.

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Reactivate consumer engagement across an expanded portfolio of brands

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2022 - 2023

Loyalty build begins!

Brand site development begins.

MAR '23

Rewards Drop integrated into Marketing Cloud.

API programs developed
for transitional communications.

Automations created
to ingest data from the Loyalty platform which were posted on the Marketing Cloud SFTP and passed data to the correct brand.

OCT 2023

Brand CRM comms emails resumed

2024 - Present

NOV 2024

Rewards Drop launches 2.0 experience

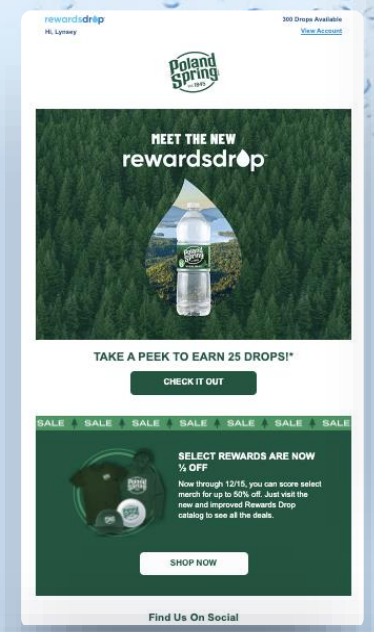
LATE 2024

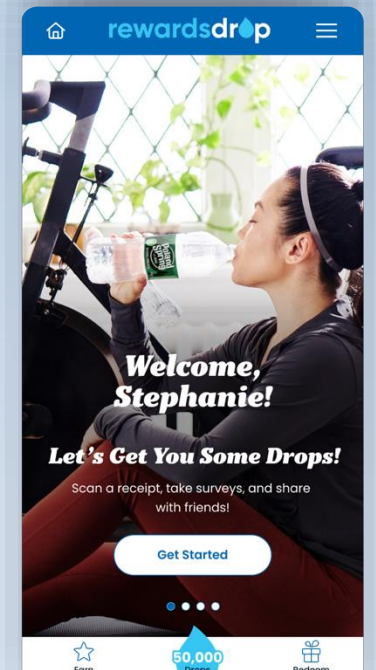
BTB and Primo Waters merged
Creating Primo Brands, so we are preparing to integrate more of Primo portfolio in 2026.

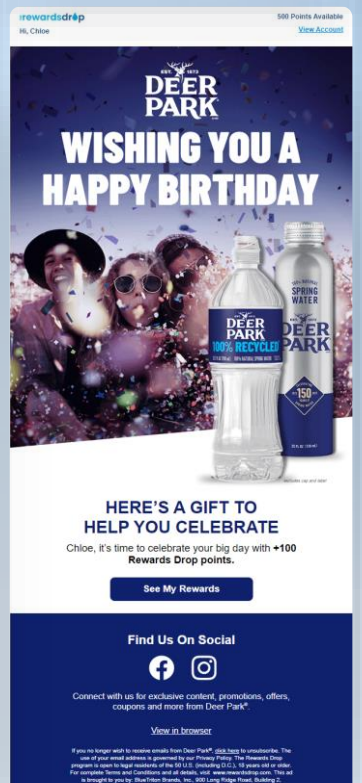
The Customer Experience Vision

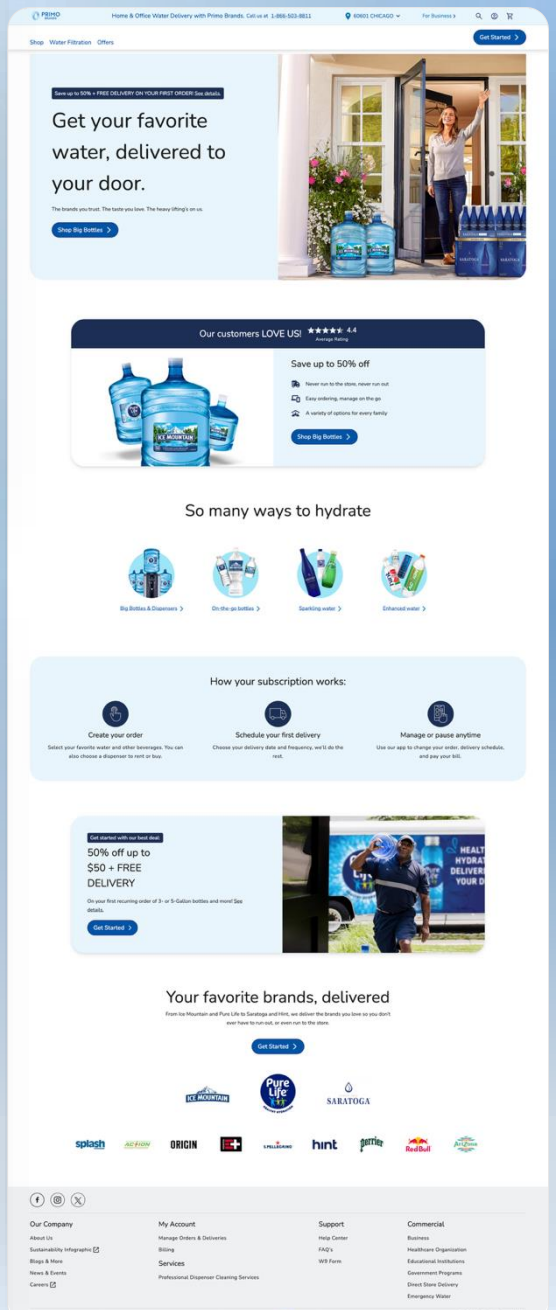
We are transforming our digital ecosystem *(including Brands and ReadyRefresh)* to enable personalized experiences and healthy hydration.

We are focused on growing our first-party data asset to deliver best-in-class experiences and rewards, growing market share, and building brand advocacy.









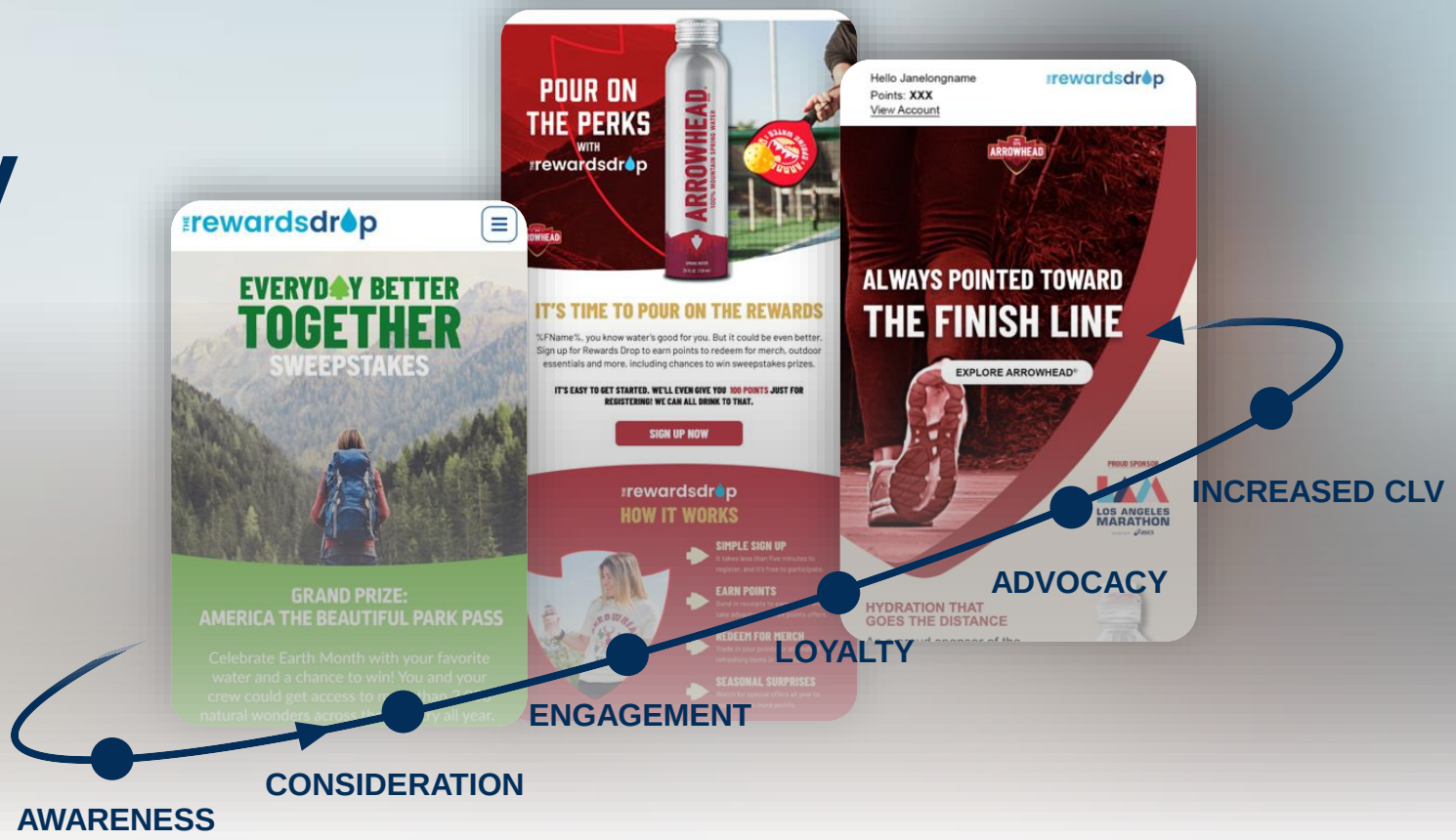
What They Want and Why

With a longitudinal view of the consumer and how they are responding to market trends, we started to layer in areas of opportunity to help shape the relationship that our consumers have with their preferred water brand.

From driving rich content on web to engaging members through personalized email experiences to turning them into brand advocates, we are layering industry insights into program decisions to understand each consumer’s “why”.

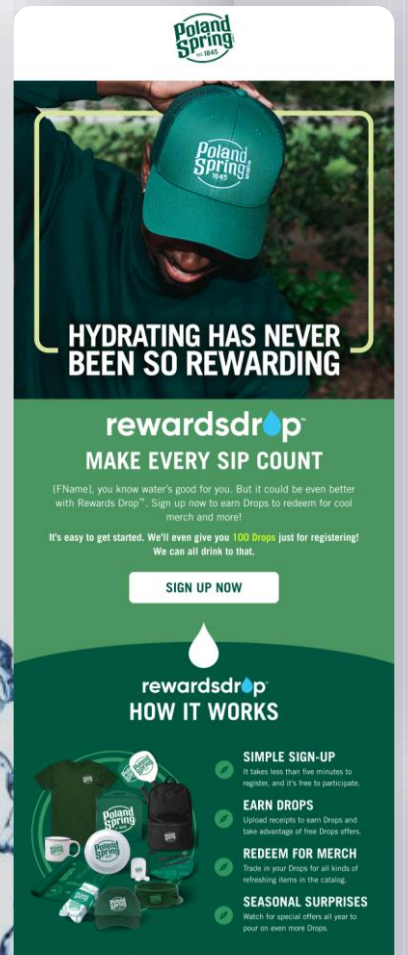
Unification of the Customer Journey Has Begun

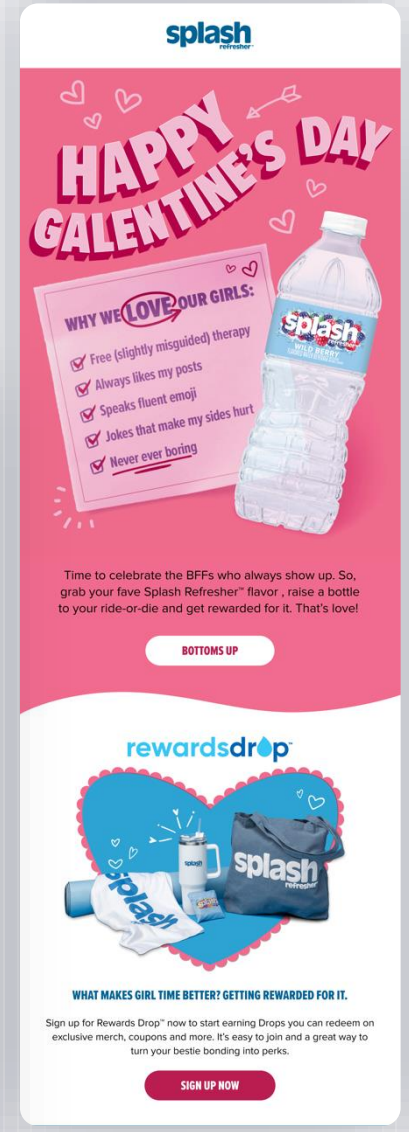
- ✓ Better Targeting
- ✓ More Seamless Journey
- ✓ Continued Engagement
- ✓ Emotional Connection

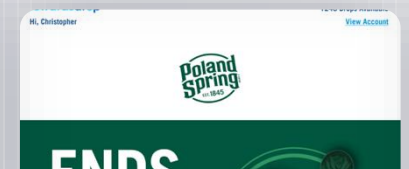


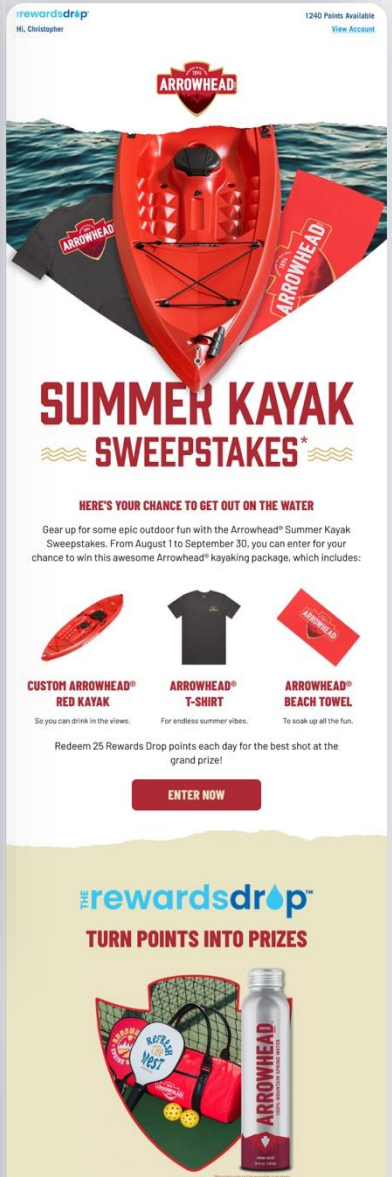
We like to stay in touch!

Regular emails engage existing members along with people who have subscribed to receive messages but have not signed up for Rewards Drop™. These messages are the perfect opportunity to deliver seasonal content, promotions, offers, coupons, and more.





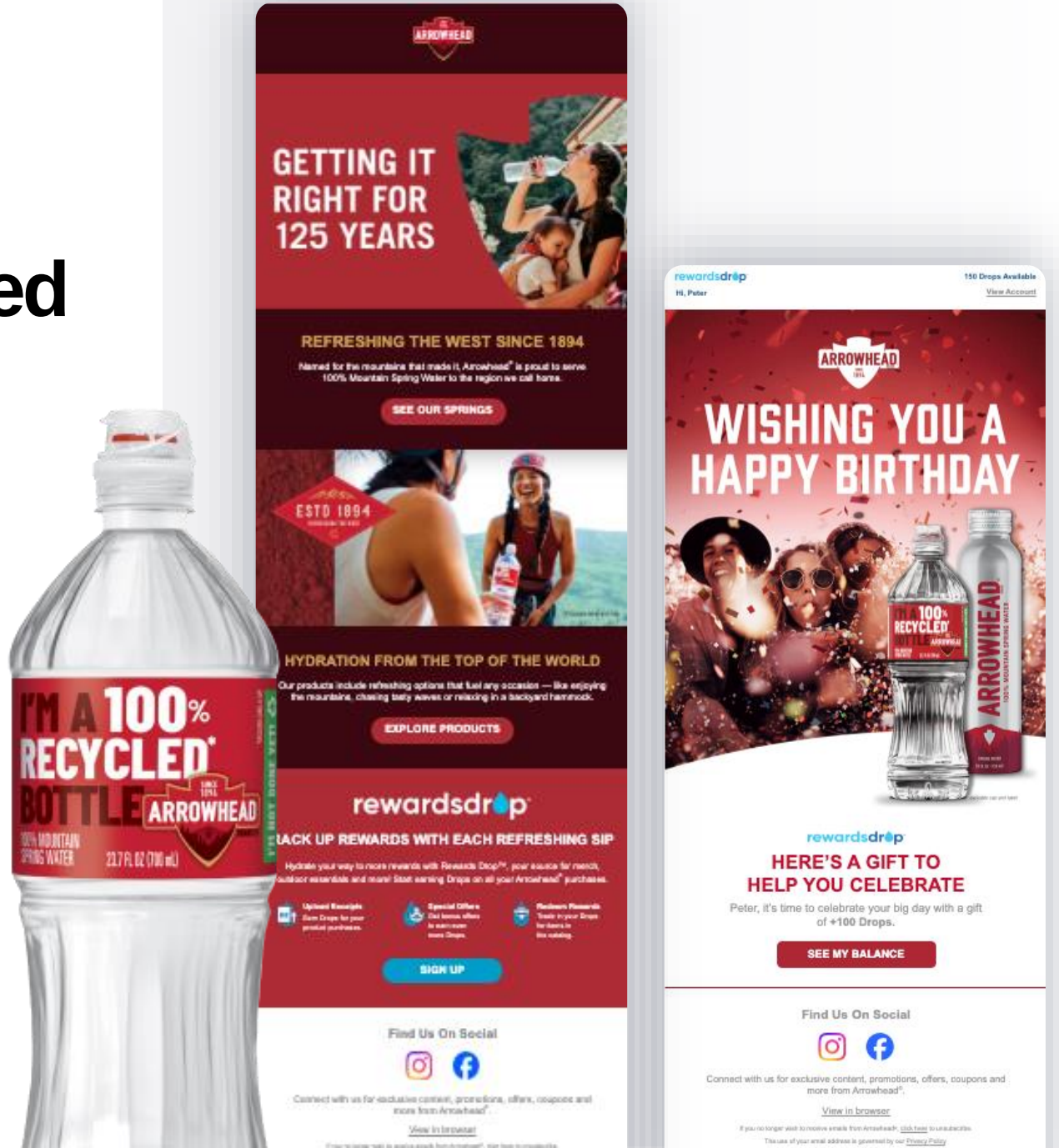




Automated Sends Triggered on Behavior

Welcome Emails
When someone opts into email for a brand, they receive a personalized welcome message. Each brand has its own welcome experience.

Birthday Emails
Our loyalty program automatically sends personalized birthday messages to Rewards members.



TECHNICAL DETAILS

Welcome Email

- **Web Registration:** API Triggered Send
- **CloudPage sign-up forms:** Triggers email using AMP script after form submission

Birthday

Rewards member:
Event Definition
Key set up in Journey Builder to trigger the email

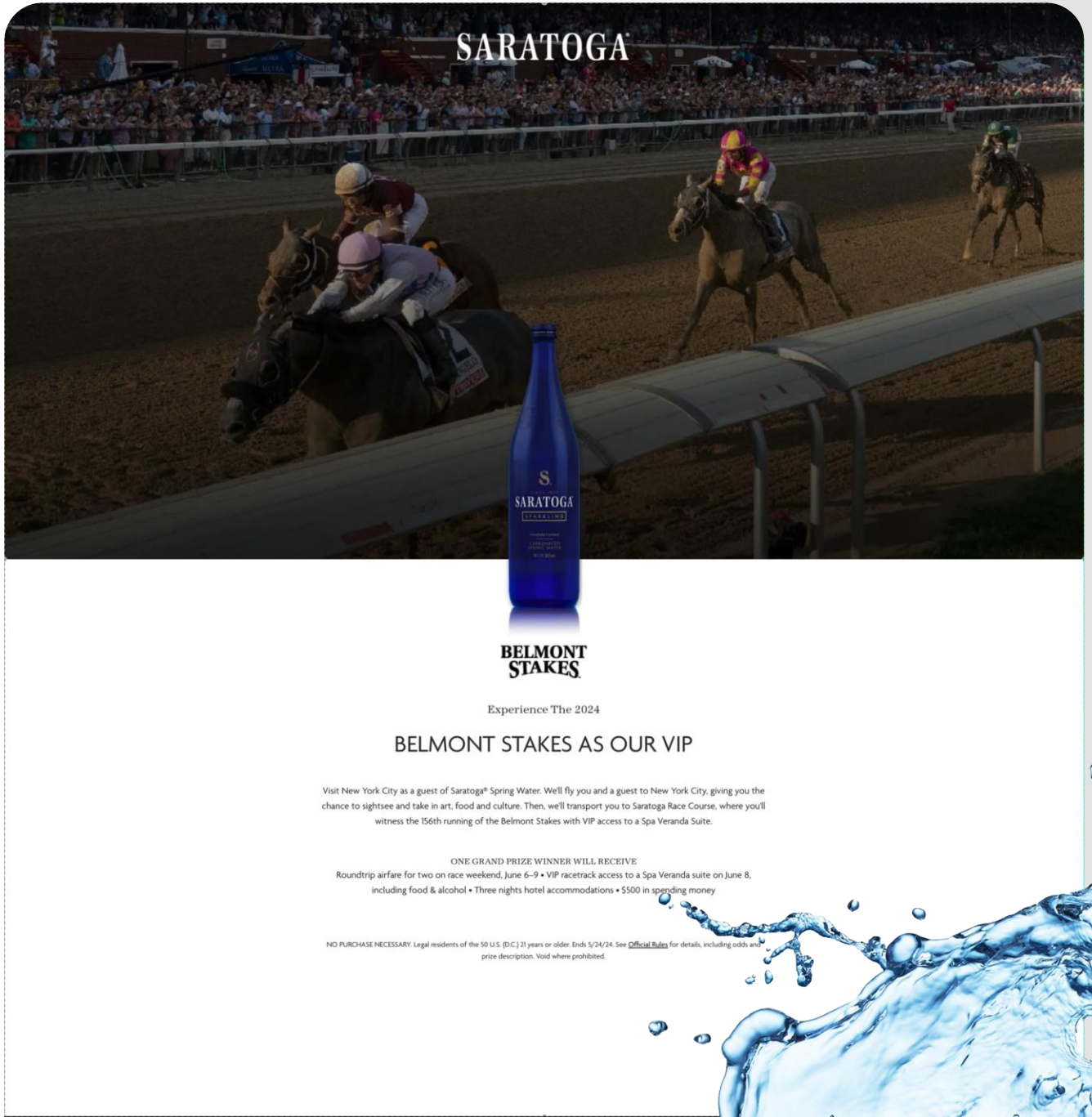
API

Event Definition Key set up in Journey Builder to trigger the email

Dynamic Forms & Landing Pages

We create engaging, interactive forms and landing pages that adapt to each brand's personality while maintaining seamless user experiences.

These dynamic touchpoints capture valuable customer data and drive meaningful engagement across our portfolio.



Key Achievements

- **Refined the Consumer Digital Strategy**
- **Drove Engagement Through Regular Messaging**
- **1PD Growth**
- **Built and Supported Brand Partnerships**

What's Next, Our Evolution

Make the most of our SFMC Capabilities

CURRENT

Utilize Einstein to hyper-personalize messaging

Further utilize modules to support new data and content formats

FUTURE

Explore opportunities with mobile engagement

Drive increased engagement and reduce unsubscribe rates with a custom CloudPage Preference Center

Q&A

Scan and play now

Connect with Merkle

We're excited to see you at Connections! Whether you want to learn more about CRM and loyalty, retail, or agentic AI, our experts are ready to help.

HERE'S WHERE TO FIND US

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Watch us explore retail growth

ENGAGEMENT SESSION

Rethinking loyalty, with Salesforce

RECEPTION

Meet our team
Room 270
3-5 PM

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Thank You

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