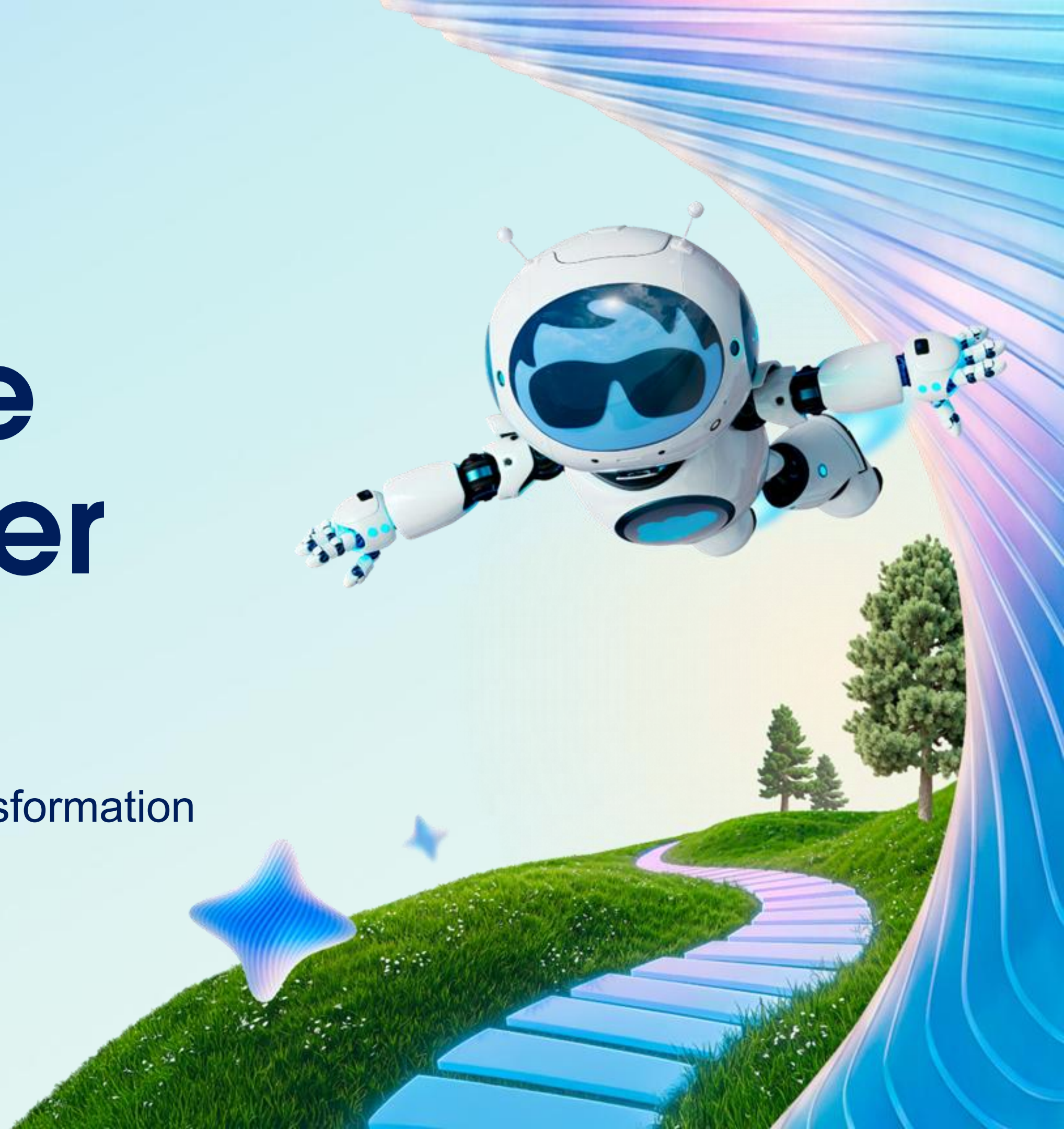




The Growth Paradox: More Revenue, Lower Costs

Moving from Good to Great; OSP as a transformation catalyst



Today's Speakers

salesforce



Chris Finazzo
Chief Commercial Officer
United Parks & Resorts



Brett Charobee
VP, CRM
United Parks & Resorts



Chris Wayman
Chief Client Officer,
Americas
Merkle, a dentsu company



Nicole Weatherbee
SVP
Salesforce

Agenda

The Setup

The Challenge

The Solution

The Results (so far...)

Fireside Chat





We power the experience economy.



Personalize every interaction

Creating tailored, meaningful human-centered experiences



Make shopping seamless

Developing the world's most high-performing commerce ecosystems



Build lasting loyalty

Strengthening customer relationships and brand equity



Empower people with data

Giving businesses uncommon insight



Engage the right customers

Focusing engagement on the most high-value customers



Deliver cutting-edge technology

Unlocking capabilities that transform organizations

EXPERIENCE & PRODUCT INNOVATION

1,000+

designers and UX
professionals

ENGAGEMENT & LOYALTY

2,500+

loyalty and
engagement experts

PLATFORMS & ENGINEERING

5,000+

technologists
and engineers

ANALYTICS & INSIGHTS

4,500+

data analysts
and scientists

CONSULTING & BUSINESS OPERATIONS

3,000+

strategists
and operators

30+ year

heritage
partnering
with ambitious
brands

UNITED PARKS & RESORTS



INSPIRING A DEEPER
CONNECTION



THRILLING EVERY
GENERATION



MAKING A SPLASH
TOGETHER



LIFELONG MEMORIES WITH
AMAZING ANIMALS



A BRIGHTER TOMORROW
FOR ALL

ICONIC PARKS. EXTRAORDINARY PEOPLE. BRIGHTER TOMORROWS.

Building on Record Growth

Following the pandemic, United Parks & Resorts (UPR) achieved record revenue and per capita growth. CRM and Salesforce have been important enablers of that success.

To continue accelerating growth — reaching new audiences through personalized, modern channels — UPR needed to deepen its CRM investment while being mindful of cost efficiency. It was time to think creatively.

The Challenge: Growth and Lower Costs

UPR set an ambitious goal: accelerate growth while simultaneously reducing marketing and operating costs. We issued this challenge to our key partners – Merkle & Salesforce responded.

What would success look like?

The goals of this transformation:

- A cohesive solution architecture and capabilities centered on the customer
- Clear customer identity, insights, and intent signals
- Customer friction → reduce
- Send less → transact more
- Leverage AI and automation to streamline processes within Marketing & Customer Care
- Reduce annual operating costs for the above



The Solution: Salesforce OSP via Merkle

Merkle & Salesforce partnered to identify where growth opportunities existed within UPR's business and where efficiencies could be gained.

We built a business case & operating model based on by specific growth scenarios, while reducing operating costs.

What is OSP?

A pre-packaged software, services, and operations model with more financial benefits than each part alone.

- "Outsourced Service Provider" where Merkle owns the software, provides strategic guidance, implements features, and operates the Salesforce Ecosystem
- Drives operating cost reductions via specific accounting treatments
- Optimizes marketing and customer service workflows to reduce customer acquisition and customer retention costs



The “Unlock” for United Parks

Drive transformation and deliver revenue growth and cost savings

- Allowed UPR to invest in new Salesforce technology to transform its owned channels and better serve customers
 - Includes: Service Cloud, Agentforce Contact Center & Voice, Data Cloud, Loyalty Management, and Marketing Cloud
- Solve for customer identity and activation
- Reduce cost to administer and support its Salesforce and Customer Data solutions
- Redeploy headcount in customer care to revenue generating roles



Additional Achieved and Expected Benefits

Real qualitative and quantitative impacts

- Revamped the customer identity approach with Merkle and Merkury identity resolution
 - Applied real-time customer attributes that can be actioned on
- Reduced technology footprint and simplified its marketing platform
- Redeployed human capital
- Identified eight figure growth opportunity for 2027: focused on increased visitation, spend in park, and season pass retention



The Results *(so far)*: Real Cost Savings

Six months into this journey - results include operating cost reductions in marketing & customer care in excess of \$1M dollars.

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Marketing

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Discover how we are helping to transform marketing into a strategic growth engine by unifying data, AI, media, CRM, commerce, service, and measurement.

Network with peers

Connect with industry peers, exchange fresh ideas, share insights, and discuss the latest trends and takeaways from Dreamforce



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Thank you

