

Note:

The following slides are selected **excerpts from a larger presentation deck.**

Content has been modified and anonymized to preserve confidentiality.

*Megan
Palmisano.*



Driven by Customer Success

Always On Customer Cloud
Transformation Vision



Ford+ "Always On" Customer360 Delivery Plan



Vision

Ford and Salesforce partner to disrupt the market, create new revenue streams and drive growth by delivering an Always On Customer360 at speed and scale.

1 "Always On" Effortless Service Experience

- Deliver Service Reservations, Mobile Service and digital customer engagement



FORD SERVICE

2 "Always On" Customer360 for All

- Single source of truth to the Customers, Dealers, and Employees supporting everyday interactions in an omnichannel environment with Ford Pass



customer360

3 "Always On" Personalized Marketing

- Easy to join journeys
- Deliver personalized offers based on data & telematics and drive loyalty
- Create and expand the Ford Communities



4 "Always On" Small Business

- Launch VIIZR in market Q2 2022

VIIZR

5 "Always On" Digital HQ

- Slack for Dealer, Customer & Ford Collaboration



Results

- ↑ Wholesale Unit Profitability
- ↓ Marketing incentives
- ↑ Cross Sell/Up Sell
- ↑ Profitable Growth
 - Direct Parts
 - Subscription
 - Digital Services
 - Ford Pro
- ↑ Customer Engagement, loyalty & LTV

Powered by  + a b l e a u



Ford + Salesforce Retail Mach-E Experience

Mach-E Retail Journey

Joyful Purchase

- Pre-Delivery
- Personalized Offers
- Abandoned Cart

1

Rocket Setup & Onboarding

- Onboarding

2

Progressive Learning & Smart Assistance

- Relevant Offers

3

Effortless Maintenance & Repair

- Charging Messaging
- Connected Vehicle Services

4

RETAIL JOURNEY PERSONAS



Chris Donovan
Customer



Jessica Moore
FMCC Rep



BlueAssist
Virtual Assistant

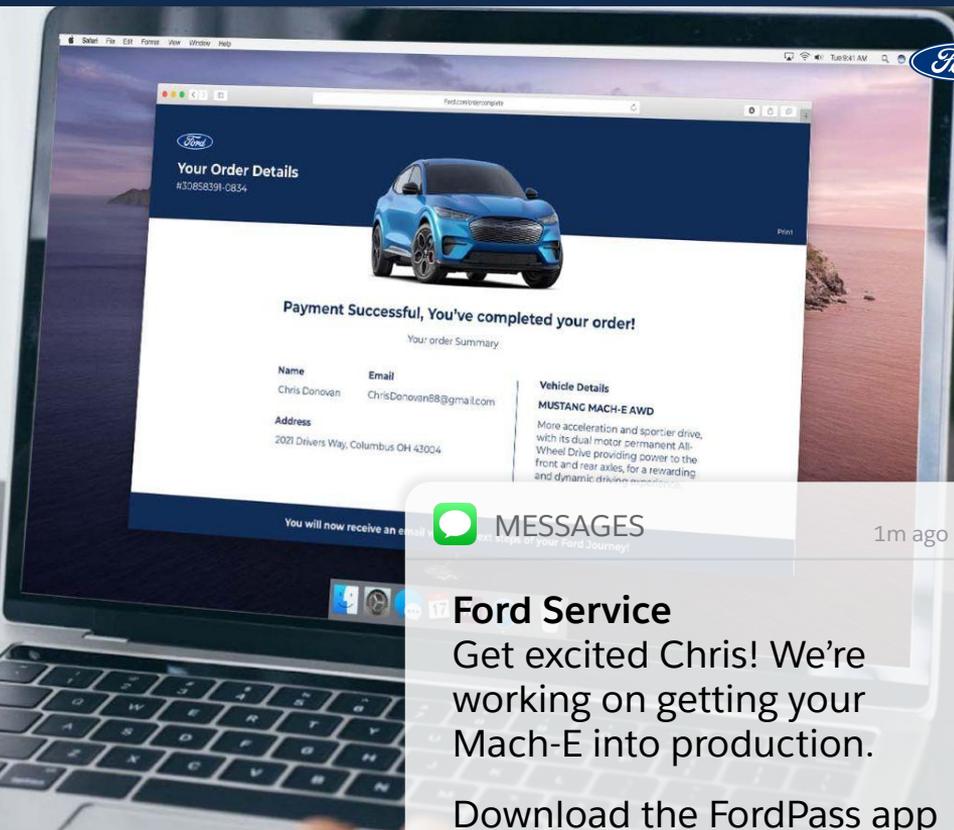


Marisol Flores
MKTG Strategist



Eric Stevenson
Dealer Rep

Chris receives a confirmation email, along with a SMS notification to download the FordPass app.



Chris Donovan
33 years old, Single
Columbus, OH



MESSAGES

1m ago

Ford Service

Get excited Chris! We're working on getting your Mach-E into production.

Download the FordPass app to stay updated on next steps: i.fordpassdl.com

Slide for more

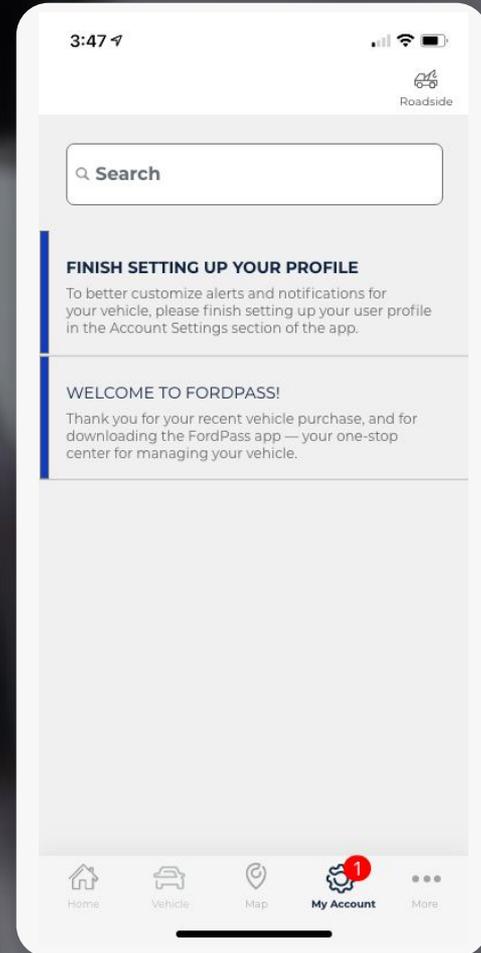


Use Case 1: Pre-Delivery

Upon downloading the FordPass app, the Message Center prompts Chris to complete the preferences section of his user profile to better tailor his Ford ownership experience.



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1

Use Case 1: Pre-Delivery

Chris can text the Ford SMS virtual assistant, BlueAssist, to get the status of the vehicle in production at any time.



11:54 [signal] [wifi] [battery]

<  **BlueAssist**
online

What's the status of my order?

Hi Chris, thanks for reaching out! We recognized your phone number as associated with your profile and order.

Looks like your Mach-E is in the paint shop getting the finishing coat of Rapid Red Metallic before it gets the clear coat.

Thanks! Can you notify me when it gets shipped to the dealership?

Of course! I'll set a 1 week SMS reminder for you to plan your pickup. Is there anything else I can help you with?

Type a message [send]



Use Case 2: Relevant Offers

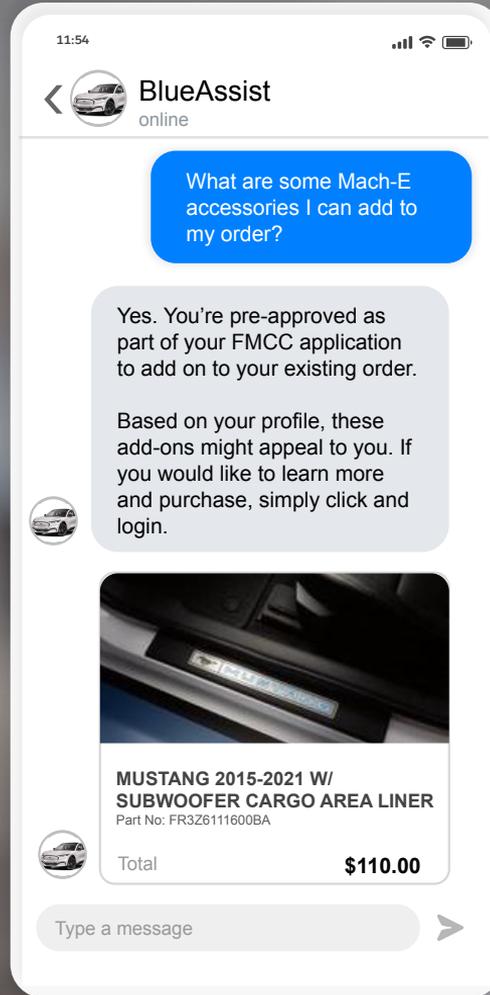
The virtual assistant suggests add-ons pre-approved with his FMCC order application.



Jessica Moore
FMCC Rep



BlueAssist
Virtual Assistant



Chris can also ask BlueAssist about accessories for his new Mach-E.

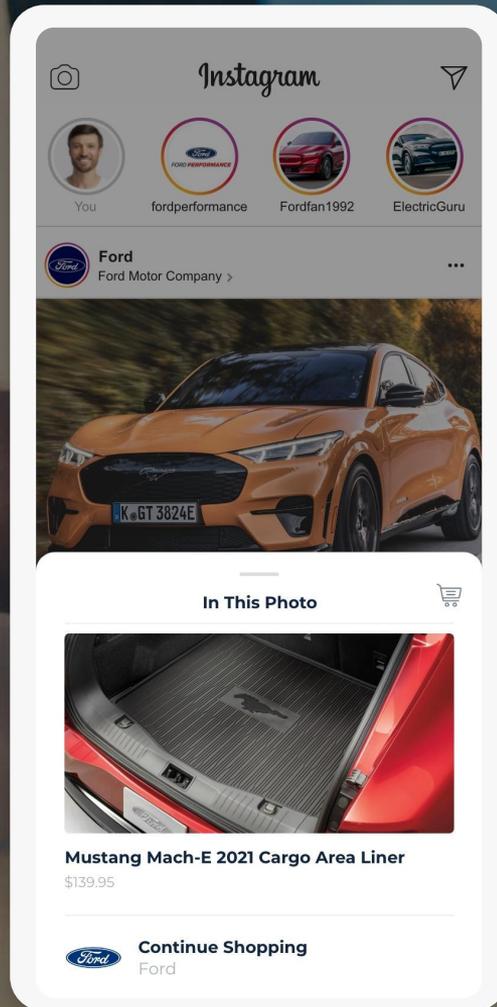
1

Use Case 3: Abandoned Cart

Since Chris didn't purchase the cargo liner, his marketing journey has been updated to target him on social media.



Marisol Flores
MKTG Strategist



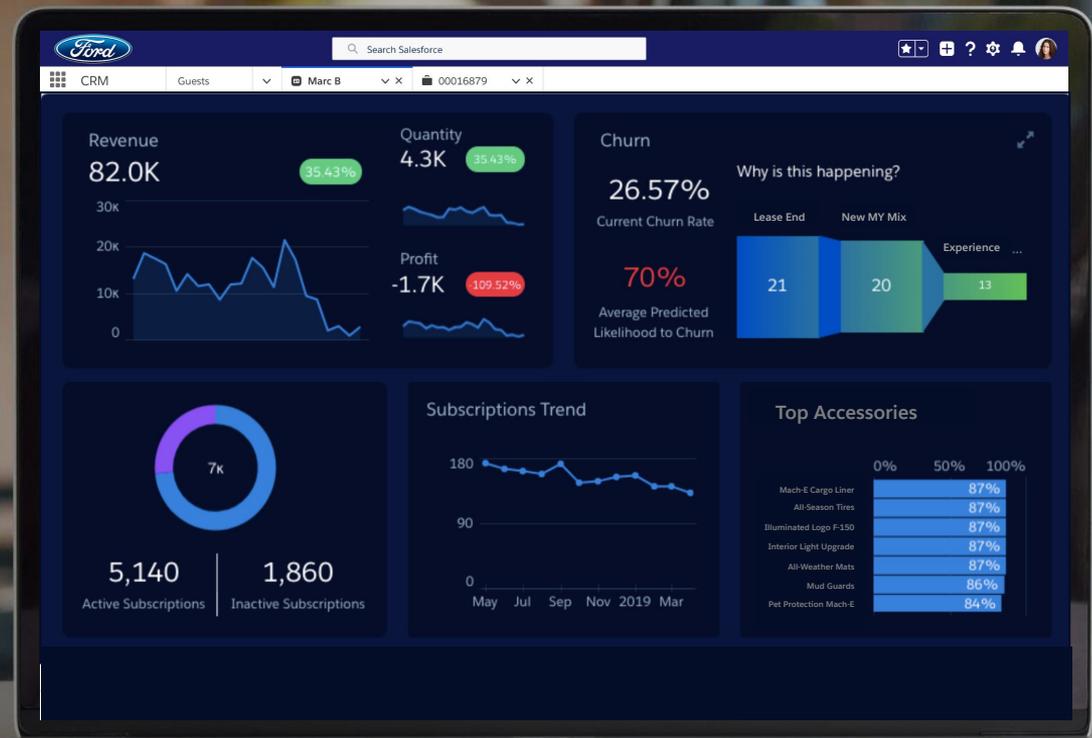
Chris sees the ad on Instagram and decides to buy.

1

1

Ford Retail - Use Case: Relevant Offers

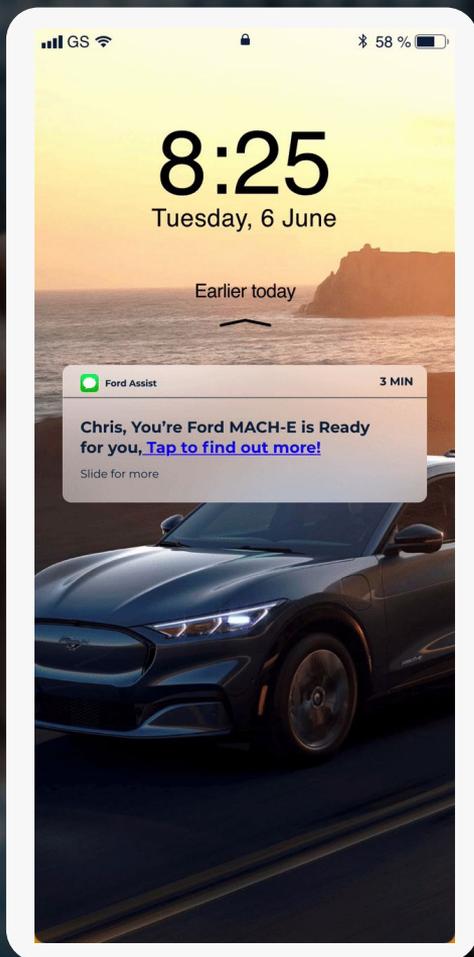
360 view of customer profile
 Marketer, Sales, Service, Dealer



Marisol Flores
 MKTG Strategist

1

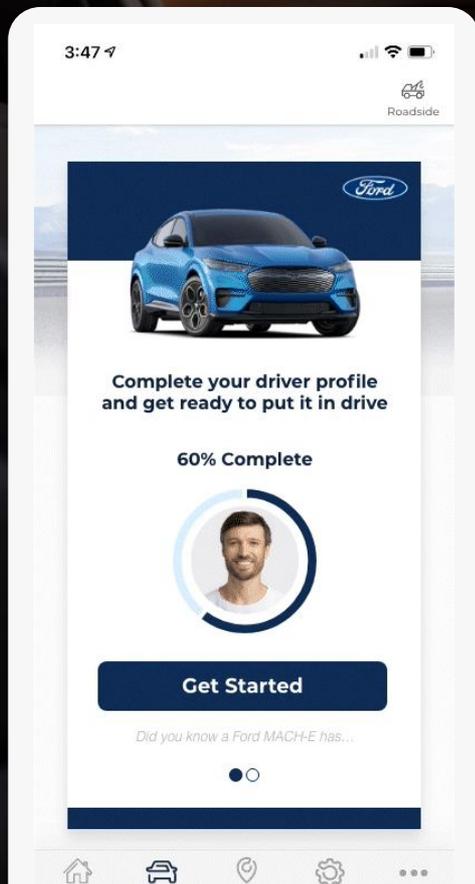
Chris is reminded his car is ready at the end of the week via SMS text message to schedule his pickup.



Eric Stevenson
Dealer Rep



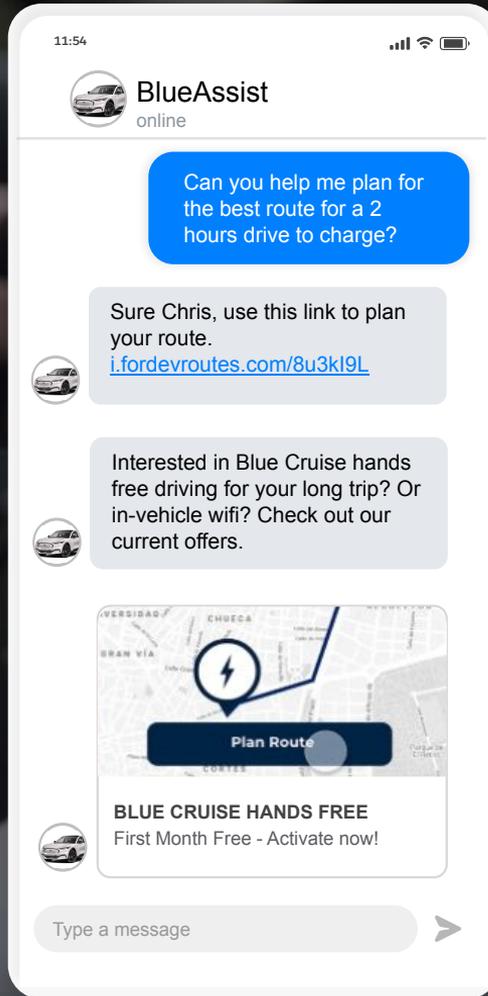
Use Case 4: New Vehicle Onboarding



As a new owner of his first electric vehicle, Chris uses the FordPass app to get accustomed to new features and ownership maintenance through the EV-Training Portal.

He selects his preferences for how much assistance/information he would like to receive as he continues to learn about his vehicle and its features.

Use Case 5: Relevant Subscription Offers



Every 2 weeks Chris will visit his parents, who live 130 miles away in Cleveland, OH.

Chris reaches out to BlueAssist to optimize his route.

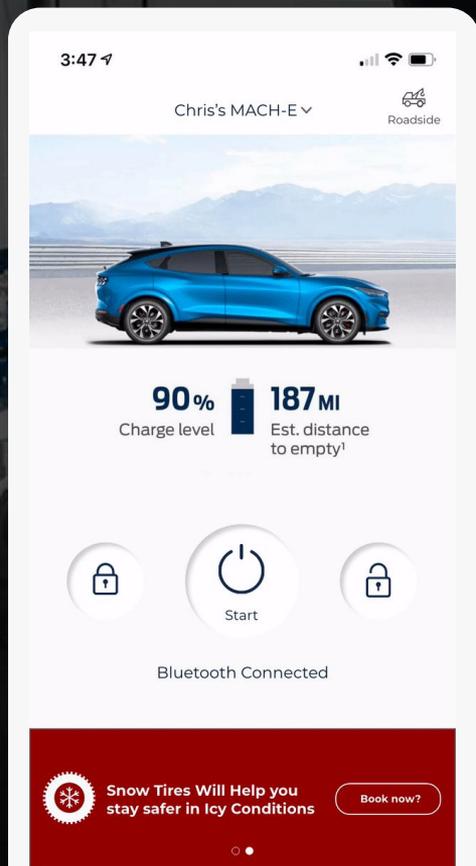
BlueAssist offers relevant offers to improve his driving experience.

3



BlueAssist
Virtual Assistant

Use Case 7: Connected Vehicle Services



The cold weather alerts include additional safety options.

Living in Ohio and driving through the snow belt prompts recommendations for studded tires permitted by the surrounding states starting November 1st.

Chris purchases and books a service visit with the Ford virtual assistant.

Use Case 6: Third Party Data infused with Telematics



It's now early October and 4 months since Chris purchased his Mach-E, and he's loving every minute.

He's able to see the status of his vehicle's health in-app and notices a cold weather alert.



Use Case 7: Connected Vehicle Service Messaging



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MESSAGES

1m ago

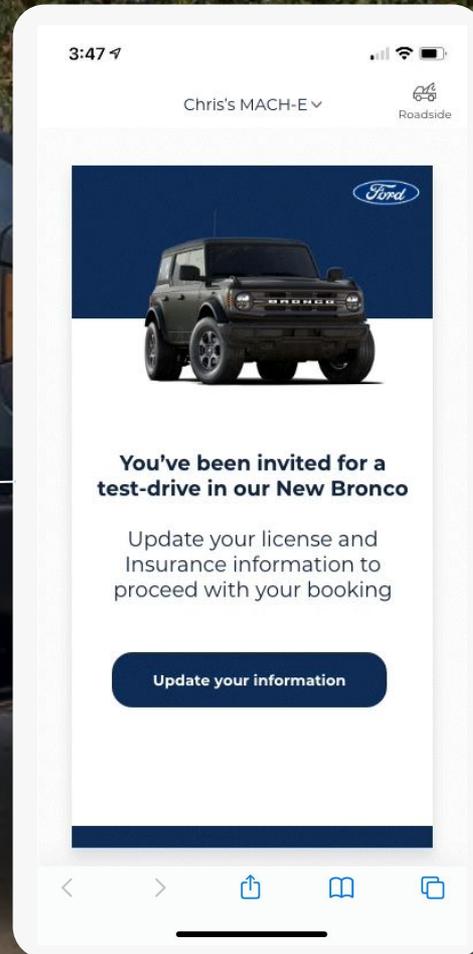
BlueAssist

Chris, good news! Your tires have arrived and we're looking forward to servicing your Mach-E.

We know you have places to be and things to do, test drive a Bronco while you wait for service.

Use this link to confirm your license & insurance are up to date and schedule your service. i.fordservice.com/et2m1M

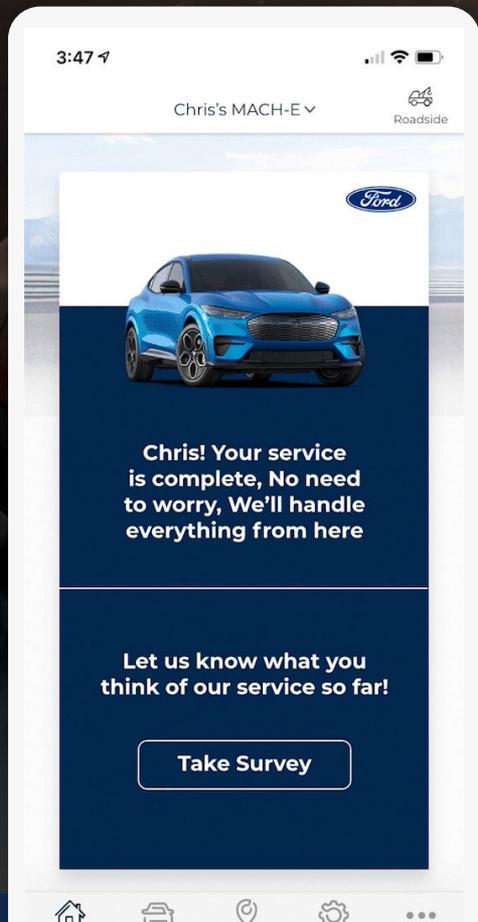
Slide for more



4



Customer Experience Impact: Collecting Feedback

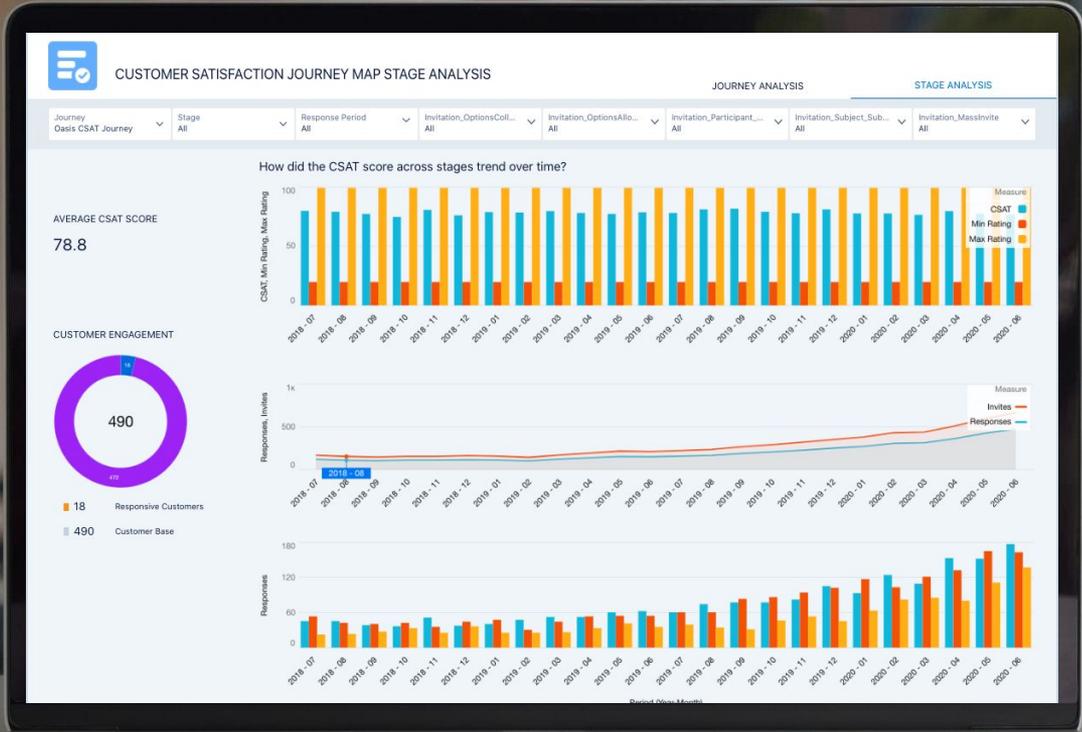


All paperwork is digital, Chris doesn't have to deal with paperwork and has the full details of his service.

He's prompted later that day, once telematics registers the engine is off, to safely request in-app feedback on scheduling his at-home service experience and the Bronco test drive.

Customer Lifecycle Analytics

Cx Managers
Support Agents



Marisol Flores
MKTG Strategist

4

Potential FMCC Upsell to the Bronco (years later)

accountmanager.ford.com

MUSTANG BRONCO CERTIFIED USED

FORD CREDIT SUVS & CROSSOVERS TRUCKS & VANS ELECTRIFIED CARS ALL VEHICLES FINANCE SUPPORT & SERVICE

FORD CREDIT

This is a great time to set up online payments. Update your Account Manager preferences or register with Account Manager today. U.S. Postal Service policy changes may delay delivery of invoices and your payments. Get started below.

Your next Ford is always within reach. Your dealer is ready to help you find your next vehicle.

\$485 per month

Finance Tools Mileage Tools

Easily manage your account
Manage your Ford Credit lease or financing from the comfort of your home 24/7.

Register

Let's get you into a Bronco

Yeah!

I'm In

Type a message



Chris Donovan
Customer



Jessica Moore
FMCC Rep



Eric Stevenson
Dealer Rep



Think Big, Act Small, & Start Now.



Speed to Value

Value Realization throughout the journey



Smart Sequence

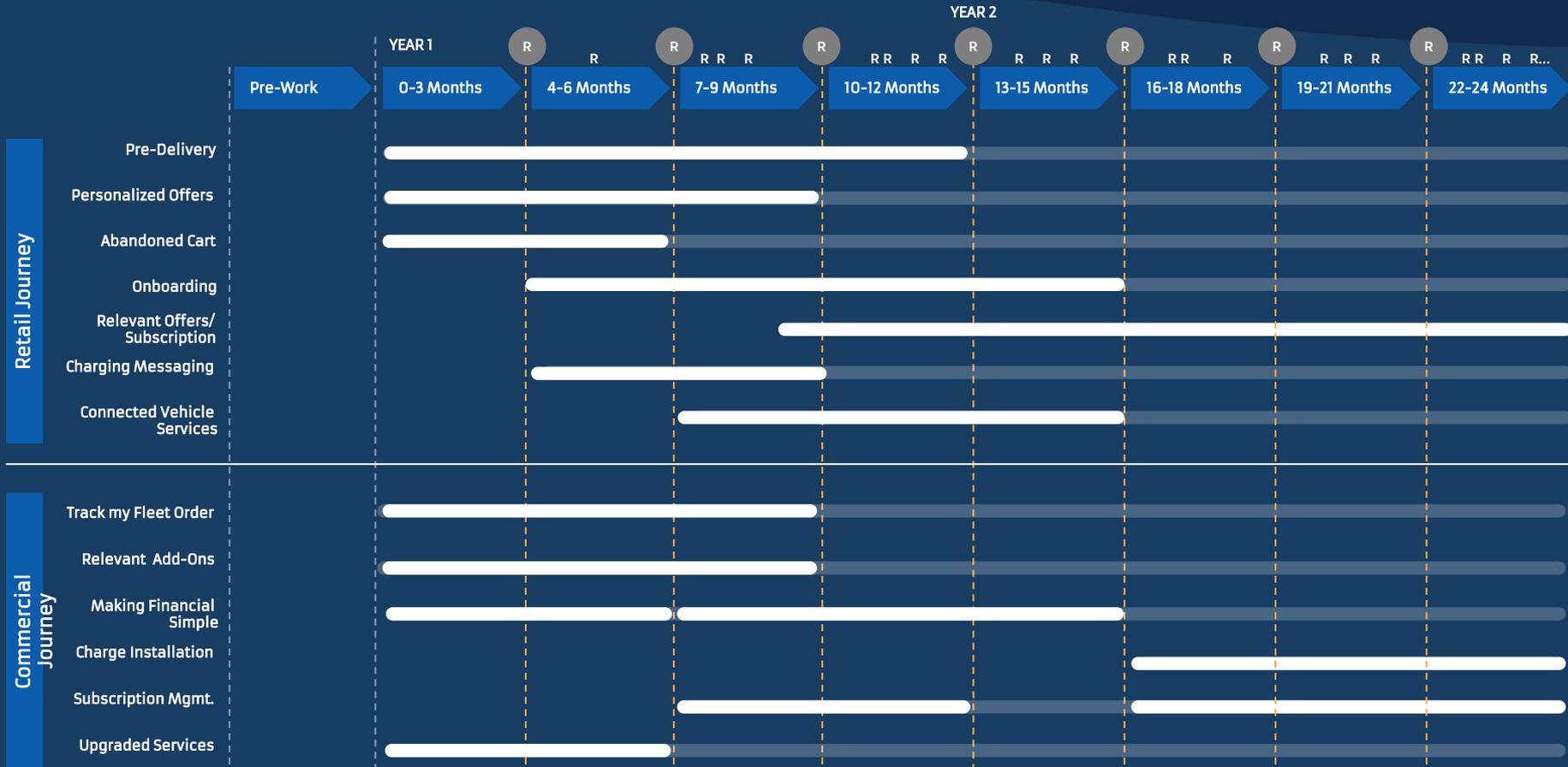
Program is phases that mitigate re-work and build on one another



Customer Centered

Releases that impact customer experience at every step

INITIAL ROADMAP - RETAIL & COMMERCIAL



--- Indicates release



1 Find & Join

Empower F-150 Trailblazers

Convert current F-150 owners and lightning

Integrate to VIIZR experience

Lever Einstein to retain Trailblazers

Market carbon impact transparency

Guerilla marketing with right partners (dependent on persona)

Connect with customers in the metaverse, and with Web3/NFT technology

Empower F-150 Trailblazers

Integrate to VIIZR experience

2 Engage & Nurture

Personalized marketing journeys; across retail journeys and commercial journeys

Lightning access program

Carbon offset program

Lightning communities by interest and geography

Train F-150 community in the customerverse

Digital F-150 experience

Lever Einstein to retain Trailblazers

Seamless pickup and delivery

Carbon offset program

3 Onboard & Deliver

A "reservation to delivery" journey

Seamless pickup and delivery

Carbon offset program

Digital F-150 experience

Train the F-150 community

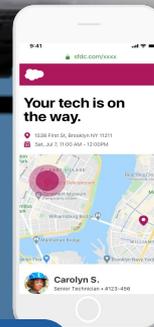
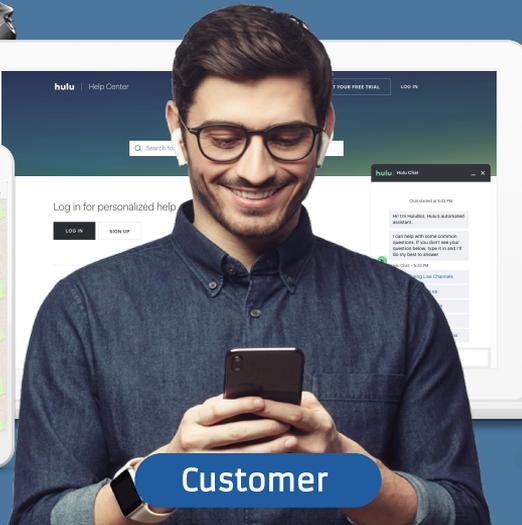
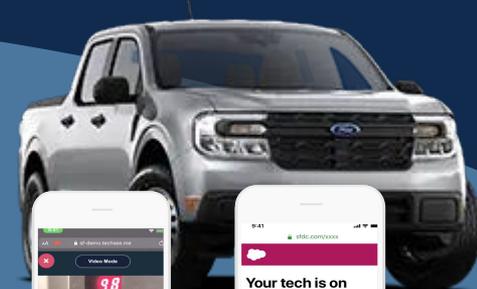
Convert current F-150 owners

Connect with customers

4

Post purchase experiences & loyalty

Optimize Your Channel Strategy Around the Customer Journey





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Driving Everyday Customer Connection Fueled by Data Intelligence, Powered by Salesforce



Chris Customer

Curated onboarding content helps Chris get the most out of his Mach-E



How to charge your new vehicle



Learn about route planning



Using optimized charging routes

He receives **personalized alerts and notifications** made possible by **enhanced telematics** and 3rd-Party Data



Winter is Coming

Prepare for colder weather by switching to Cold Shield Studded Tires. Reserve your at-home tire change service today.

He easily **schedules service** where it is most convenient



Chris, it look like this is the nearest local dealership.



Would you like to schedule your service here or try our convenient At-Home Service?

Dealership Service

At-Home Service

Chris is able to **track production** on his new Mach-E



Hi Chris, Here is the status of your order!

Click to Explore each process

1

Order

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

2

Confirmation

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et

He is able to activate **personalized offers w/ FMCC pre-approval**



Hi Chris, Based upon your usage patterns we see you do this trip often.

To make this a relaxing journey, we are offering a free 60 day trial of our hands-free highway driving feature BlueCruise

Activate BlueCruise?

Targeted marketing connects Chris with relevant Ford products

Instagram

ford • Follow



In This Photo



Mach-E Winter Studded Tire Set \$860.00

He is able to quickly **give feedback** on the service and **add-on test drive**

How do you rate our Servicing and recommendations?

How did you rate your Bronco Test Drive Experience

One Being The Lowest 5 being The Highest

★★★★★ 5/5





salesforce

Driving End-to-End Commercial Excellence

Fueled by Customer Insights, Powered by Salesforce



Essence
FORD Pro Customer



Jenn
FORD Charging Specialist

Essence receives personalized comms with **relevant service & subscription add-on recommendations**



Get Charged Up!

Essence, in preparation for your fleet, now is the time to discuss keeping your e-transits charged. The Ford Connected Charge Station, charges up to 10X faster than a standard wall outlet. Designed with a weatherproof case and 20-ft. cable, enjoy accessible charging whether you choose to install it indoors or outdoors.

Schedule a Chat Today

Jenn communicate directly with Essence using **in-org chat** to schedule meetings and send messages

SHOW ALL GOLDEN STATE 29 NOV MON 30 NOV TUE 1 DEC WED

Golden State

| | | |
|----------------------------|------------------|-------------|
| Monday, November 29th 2021 | 7:00AM - 8:00AM | Recommended |
| Monday, November 29th 2021 | 8:00AM - 9:00AM | Recommended |
| Monday, November 29th 2021 | 9:00AM - 10:00AM | Recommended |
| Monday, November 29th 2021 | 7:00AM - 8:00AM | Recommended |
| Monday, November 29th 2021 | 8:00AM - 9:00AM | Recommended |

Jenn **seamlessly connects Essence with a FinSimple rep** so she can complete financing for her upgraded charging package

Connect with FinSimple

Schedule Appointment

Payment Center

CPQ Utilities

Einstein Configuration - Insights

Sharing

Essence uses **Ford PRO Virtual Assistant** to stay on top of fleet management

PRO Messages 1m ago

Ford Pro
Hi Essence! I'm Pro, your digital Ford Assistant! I'm going to keep you up to date on your Ford Order. Currently, your Status is Order Submitted.

I'll stay with you throughout the process, feel free to reply to me to get updates and more!

Jenn is able to **understand Essence's account utilization** and position offers based on her **propensity to buy**

FORD PRO Account Utilization



Propensity to Buy



EV Charger

Jenn is able to use **guided selling** and **knowledge** to answer questions and get to solutions faster

Next Best Action



Submit Charging Permit Application

Orlando, FL requires permit applications for fast charging installations. We can digitally submit customer applications.

Yes, submit installation application





THE Q4 SUCCESS PACKAGE



Chris
Mach-E Customer

Mach-E Retail

Driving Everyday Customer Interactions



Essence
FORD Pro Customer

E-Transit Commercial

Driving End-to-End Commercial Excellence

15 Prioritized
Use Cases

34 Customer
Capabilities

30
Foundational
Capabilities



Platform that delivers our brand promise, providing everyday experiences that save time, uplift, and create personal connections.

$$\begin{array}{rcl}
 \text{Licenses} & & \text{Services} & & \text{Success Package} \\
 \$\text{XXXM} & + & \$\text{XXXM} & = & \$\text{XXXM}
 \end{array}$$



EXPERIENCES BILL OF MATERIALS

E-Transit Experiences

Track My Fleet Orders

Depot Charging Installation

My Fleet Charging Options

Upgrade Telematics

FInSimple for Charging Financial

Know the charge status

Commercial Line Of Credit (CLOC)*

BEV Experiences

Pre-Delivery Status Update

Relevant Offers OTA/Subscriptions

Vehicle Relevant Offers Merch & Accessories

3rd party data infused with telematics

Abandoned Cart

Connected Vehicle Services Message

New EV Onboarding

Express Leads*

Solution Outline



Marketing

- Marketing Cloud
- Customer Data Platform
- Interaction Studio
- Datorama



Field Service

- Field Service
- Visual Remote Assist
- Digital Engagement
- Appointment Assistance



Experience Cloud



myTrailhead



Commerce

- CPQ
- B2B Commerce
- Revenue Cloud



AI

- Einstein
- Tableau CRM Plus



Mulesoft



Infrastructure

- Salesforce Connect
- Shield & Data Mask



Thank You.