



# Data 360 Use Case Framework & Industry Library

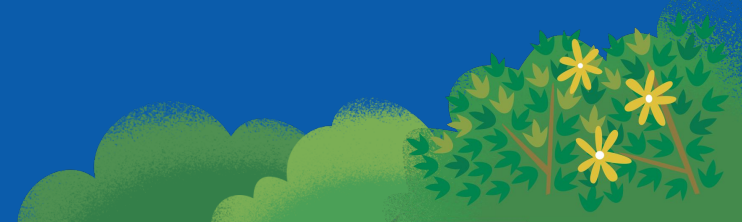
**Questions? Feedback?**

Contact Andrew Lee, Sr. Manager, Product Marketing

Last Updated: January 21, 2026



# Retail & Consumer Goods (RCG)





RCG

Retail



# Targeted Advertising: New Product Launch

**As:** a retail marketing manager,

**When:** my organization introduces a new product line,

**I want to:** deliver timely, targeted advertising to increase awareness amongst customers, based on purchase history and interests

**So that I can:** reduce cost per acquisition, increase return on ad spend (ROAS) and incremental revenue.



**Connect & Harmonize:**  
*What types of data do I need?*



**Analyze & Predict:**  
*What new metrics can I build?*



**Ground AI with Trusted Data:**  
*How could I work smarter with AI?*



**Automate & Activate:**  
*How can my data power actions?*

**Commerce/data lake:** Past purchase history, product usage

**Sales/service:** demographics, previous interactions, preferences, customer feedback

**Marketing:** web browsing data, ad engagement

**Unstructured:** knowledge articles, product documentation, historical product sales performance data

**Calculated insights:** propensity to buy, propensity to churn, CLTV

**External models (BYOM):** likelihood to respond to a given promotion, product interest scoring

**Clean Rooms:** analyze current audience overlap with partners/publishers and ROAS across existing advertising activations

Power **product recommendations and personalized discounts/offers** for use in ad activations

**Via Marketing Cloud, generate brief for advertising campaign** with proposed target audiences

**Activate segments/data directly to advertising partners Google, Meta, Amazon, LinkedIn** (plus partners on the AppExchange e.g., LiveRamp) with native connections

**Activate segments to ad partners and receive segment-level insights** on demographics, in-market trends, and more to optimize ad copy and creative.



# Personalized Shopping: Seasonal/Event-Based Promos

**As:** a retail marketing manager,

**When:** my organization's sales cycles align to specific seasons or events,

**I want to:** deliver personalized recommendations and product offers to customers on preferred channels, based on purchase history

**So that I can:** increase conversions, marketing engagement, and customer lifetime value (CLTV).



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**Commerce/data lake:** Past purchase history, product usage

**Sales/service:** demographics, previous interactions, preferences

**Marketing:** real-time engagement data (e.g., clicks, cart abandon, web browsing), previous marketing interactions with brand

**Unstructured:** product documentation, manuals

**Calculated insights:** propensity to buy, propensity to churn, CLTV

**External models (BYOM):** likelihood to respond to a given promotion, product interest scoring

**Clean Rooms:** analyze current audience overlap with partners/publishers to inform targeting; enrich unified profile data with 3rd-party partner data

Power **product recommendations and next-best-offers** (e.g., personalized discount). **Surface across CRM apps, segment-building, activations**

**Via Marketing Cloud, generate brief for seasonal/event promotional campaign** with target audiences and draft content

**Automate Flows to send personalized marketing messages** to increase awareness of seasonal offerings

**Personalize web/storefront experiences** for known, returning users (e.g., hero image with product recommendations and discount) via activation to Marketing Cloud, Commerce



# Proactive Service: Product Recalls

**As:** a retail service manager,

**When:** there is a product recall or potential safety issues,

**I want to:** proactively notify customers and give them options for next steps (e.g, replacement, refund, etc.)

**So that I can:** adhere to safety regulations, increase CSAT and service agent productivity, and decrease case resolution time.



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**Commerce/data lakes:** purchase history, product usage data, unstructured product documentation

**Sales/service:** sales orders, previous service interactions and cases, call transcripts

**Marketing engagement:** product info or FAQ browsing, form completes

**Loyalty:** preferences, status/tier

**Calculated insights:** propensity to churn, efficacy of most common contact reasons and path to resolutions

**Power recommendations for service reps on next steps** (e.g., offer a product refund or replacement).  
**Surface insights from Data 360 in Service Cloud, via Slack, etc.**

Generate **marketing segments that include suppression/exclusions** for customers with open service cases

**Configure Agentforce** for service-related product knowledge management, Q&A

Send **targeted alerts to customers on preferred channels** (e.g., mobile app, email) based on order history and preferences. **Give option to return or replace products w/ personalized discount** for next purchase

Create Flows that **close service cases and send out follow-ups to collect feedback**, answer remaining questions.



# Personalized Up-Sell and Cross-Sell

**As:** a consumer goods sales manager,

**When:** a customer makes a purchase of X size in the last Y days,

**I want to:** reach out and deliver personalized offers on complimentary products based on geographic trends, previous purchases, etc.

**So that I can:** increase customer retention and incremental revenue, and decrease churn.



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**Commerce:** purchase history

**CRM:** demographics, accounts

**Data lake/warehouse:** product usage, POS/in-store sales

**ERP:** inventory, pricing

**Marketing:** engagement data (email, mobile, web)

**Loyalty:** preferences, status/tier

**Calculated Insights:** customer lifetime value, propensity to buy

**Power recommendations for complementary products or services** (e.g., customer bought bulk order of X, recommend they purchase Y with free shipping).  
**Surface insights in Sales/Service consoles.**

**Generate draft outreach sales emails personalized with customer preference/purchase history detail for human review before sending**

**Activate AI-generated sales emails;** leverage real-time/streaming customer engagement data to **trigger notifications to sales for follow-ups/nurture** with personalized tips, comms templates, etc. as needed.



# Healthcare & Life Sciences (HLS)





# Increase Awareness of New Product Offering

**As:** a life sciences sales manager (e.g., pharmaceuticals),

**When:** my organization releases a new drug into the market

**I want to:** increase awareness amongst healthcare providers (HCP) related to the the new offering and the benefits of prescribing,

**So that I can:** increase conversion, incremental revenue, overall HCP CSAT and retention.



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**Sales/Service:** previous sales conversations, transcripts, purchase history, service cases

**Unstructured, data lakes:** knowledge articles, regulatory guidelines, industry publications, blogs

**Marketing:** real-time engagement data (product, pricing web page views)

**Calculated Insights:** propensity to buy, brand/company score and ranking, time since last purchase

**Clean Rooms:** analyze current audience overlap with partners/publishers and ROAS across existing advertising activations; enrich unified profile data with 3rd-party partner data

Power **Next-Best-Action insights for sales reps on how to engage specific HCPs, including product and discount recommendations.** Surface in Sales/Service Cloud.

**Via Marketing Cloud, generate brief for promotional campaign** focused on generating awareness for new drug, including target audiences and draft content

**Automate Flows to send personalized marketing messages** to HCPs, reminders for follow-up calls to answer questions, discuss next steps, etc.

**Build and activate segments/data directly to advertising partners Google, Meta, Amazon, LinkedIn** (plus partners on the AppExchange e.g., LiveRamp) with native connections



HLS

Healthcare: Provider



# Service Line Optimization/New Patient Acquisition

**As:** a marketing manager for a healthcare provider,

**When:** existing patients have potential unmet needs related to their current treatment plans (e.g., sports injury > preventative heart health),

**I want to:** proactively identify, target, and convert them from a single service line to another based on a holistic view of their care,

**So that I can:** increase service line revenue, physician utilization, and overall patient lifetime value.



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**Electronic health records:** medical history, medication, allergies, lab results, clinical notes, appointments

**Health Cloud/CRM:** patient profiles, care plans, patient engagement, clinical analytics, compliance/regulatory data, feedback, service history and cases

**Marketing:** engagement data (web, mobile, ads)

**Calculated Insights:** risk tiers or rankings, propensity to need specific services over time, propensity to engage with specific service line, health scoring

**Clean Rooms:** enrich unified profile data with 3rd-party partner data; leverage combined data sets to power lookalike modeling

Configure Agentforce to autonomously **provide customers with additional information, schedule appointments, or enroll in onboarding journeys** when prompted, based on patient profile

**Via Marketing Cloud, generate brief for promotional campaign** focused on generating awareness for additional services, including target audiences and draft content

**Automate Flows to send personalized marketing messages** to increase awareness of service line offerings on preferred channels

**Personalize web experiences** for known, returning users (e.g., hero image with recommendations for different offerings) via activation to Marketing Cloud



# Prior Authorization: Approval Optimization

**As:** a health plan/insurance manager,

**When:** I receive a request from a healthcare provider (HCP) for approval before rendering services (e.g., surgery, prescription drugs, etc.)

**I want to:** leverage real-time patient data to speed up the prior authorization process

**So that I can:** reduce downtime and cost of operations while improving patient outcomes and CSAT.



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**Electronic health records:** medical history, medication, allergies, lab results, clinical notes, appointments

**Health Cloud/CRM:** patient profiles, care plans, patient engagement, clinical analytics, compliance/regulatory data, feedback, service history and cases

**Other/unstructured:** risk guidelines and docs, clinical ops data, prior authorizations

**Calculated Insights:** risk tiers, risk propensity scores, likelihood of request acceptance/rejection

Power **comparison of HCP treatment request details against company risk guidelines and prior claims/authorizations** to determine medical necessity.

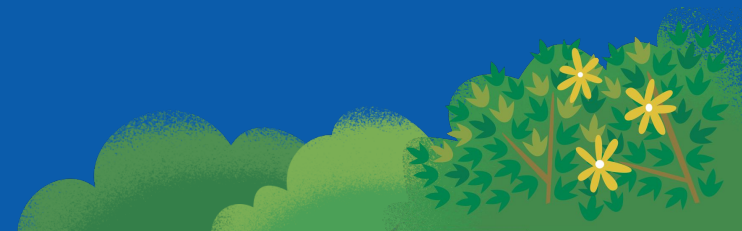
**Develop recommendations on next steps, requests for additional information and draft comms for approval/rejection** for human manager to share with HCP

**Surface request submission data to insurance managers in real-time using automated data actions or Flows** (e.g., show in CRM console, Slack).

Utilize Flow capabilities to **automatically send approval/rejection comms** with HCPs, **update records and close requests in source systems.**

# Financial Services (FINS)

Financial Services (FINS)





# Policy Application Review and Approval

**As:** a policy underwriter,

**When:** I receive a new policy application from a customer,

**I want to:** more efficiently review the application against company policy and understand changes or additional info needed for approval

**So that I can:** increase team productivity, customer satisfaction, and policy retention.



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**Data lake/warehouse, unstructured:** policy data, previous authorization data, risk and regulatory guidelines and documentation

**Sales/service:** previous service interactions, claims data

**Marketing:** behavioral/engagement data against policy related touchpoints (email, mobile, web)

**Calculated Insights:** customer lifetime value (CLTV), propensity to churn

Power **analysis of policy application against company risk/claims guidelines**, suggestions for additional information or documentation required

**Via Marketing Cloud, generate brief for future onboarding journey/campaign** with target audiences and draft content (welcome comms, coverage details, instructions, etc.)

Trigger **alerts to underwriting team to review incoming applications** in real-time (data actions, Flow)

Configure **Agentforce to provide personalized guidance to human underwriter about required updates to policy** based on automated risk assessment; draft and send comms

Post-approval, **automatically close case(s), update CRM records**



# Policy Renewal Management

**As:** an insurance agent/sales manager,

**When:** customers has a policy due to expire in the next X days,

**I want to:** proactively alert them about renewal options and more efficiently update policies on their behalf

**So that I can:** increase agent/team productivity and CSAT, while decreasing churn/attrition.



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**Data lake/warehouse, unstructured:** risk guidelines, knowledge articles, company policies/manuals

**Sales/service:** customer preferences, policy history, claims data, service interactions, health information

**Marketing:** email/ad engagement, web behavior (clicks, form completes, policy page views)

**Calculated Insights:** customer lifetime value (based on premiums, previous claims), behavioral trends, health scores, propensity to churn

Power **risk assessments and claims forecasting** to determine next-best actions or recommendations for personalized premiums/coverage

Configure **Agentforce to answer policy renewal questions and point to additional information; trigger policy renewal actions, request additional information from customer, etc.**

Leverage Flows to **send automated messages to customers about upcoming renewals and next steps** on preferred channels

Reps fielding inbound calls can **apply personalized offers directly from within console/in the flow of work; automatically add customers to onboarding/educational journeys post-call** as needed



# New Checking Account: Driving Deposits

**As:** a banking marketing manager,

**When:** a customer opens a new checking account,

**I want to:** increase deposit volume and bank liquidity through personalized marketing for cash bonuses, waived fees, etc.

**So that I can:** increase revenue growth rates and decrease deposit/acquisition costs.



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**Data lake/warehouse, unstructured:** product usage data (accounts, credit cards), transaction data, credit score/health, product manuals

**Sales/service:** account/contact details, past service interactions, preferences, past purchases

**Marketing:** previous engagement across channels (email, mobile, web, ads)

**Calculated Insights:** customer lifetime value (CLTV), financial health scores/tiers, share of wallet insights (status across retail, wealth, commercial, etc.)

**Determine probability to engage, readiness to increase deposits or when customer may remove funds** to influence next-best action/offer

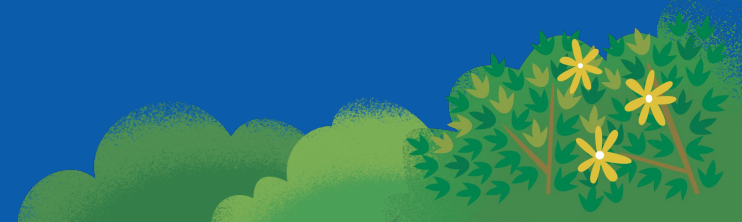
Configure **Agentforce for autonomous account/services Q&A**

**Via Marketing Cloud, generate brief for deposit-focused campaign**, including target audiences and draft content

Activate **targeted segments to Marketing Cloud for personalized journeys with messaging about special offers for hitting X cash threshold in Y time** (cash bonus, waived fees, reward points)

Via Marketing Cloud, **personalize web experience with relevant imagery and offers** (e.g., hero image)

# Manufacturing, Automotive, Energy & Utilities (MAE)





MAE

Automotive



# Auto Lead Management: Marketing-Sales Handoff

**As:** an automotive sales/dealership manager,

**When:** a customer or prospect has previously been active across marketing touchpoints but has lapsed or not yet converted,

**I want to:** more efficiently engage them with tailored content/recommendations/follow-ups (e.g., schedule test drive, financing)

**So that I can:** increase conversion, up-sell/cross-sell revenue, and operational efficiencies



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**Marketing Engagement:** pricing or product web browsing, email/ad engagement, form completes

**Sales:** demographics, purchase history, vehicle preferences

**Service:** cases, knowledge articles

**Data Lake/Warehouse, unstructured:** vehicle telemetry and usage, product manuals, product sales history

**Calculated Insights:** propensity to buy, lead scoring/ranking, customer lifetime value scores

**Power recommendations for sales reps on next steps** (e.g., schedule a follow-up call to answer questions, discuss financing, schedule a test drive). **Surface insights from Data 360 in Sales Cloud, via Slack, etc.**

**Generate follow-up emails** with personalized offers or **campaign brief for nurture journeys**

Capture web data in real-time and **configure Flows/data actions to trigger an alert to sales reps via Slack** about potential opportunities

Create **targeted segment and activate for nurture journeys** via Marketing Cloud



# New Car Purchase: Personalized Onboarding

**As:** an automotive sales/marketing manager,

**When:** a customer purchases a new vehicle from the manufacturer for the first time,

**I want to:** deliver personalized messages and content that help customers get optimal use out of their car

**So that I can:** increase product adoption, CSAT, and retention while decreasing future service case volume.



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**Automate & Activate:**  
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**Data lake/warehouse:** product usage, telemetry

**Unstructured:** product knowledge articles and guides, sales and service calls

**Sales/service:** purchase history, vehicle preferences

**Marketing:** email/mobile/ad/web engagement

**Calculated Insights:** product usage or onboarding scores/tiers, vehicle health scoring, propensity to buy for up/cross-sell opportunities

Power **recommendations related to types of content/outreach** required to achieve ongoing use of car. Surface in Sales/Service Cloud.

Configure **Agentforce to autonomously perform Q&A, point customers to FAQ, brochures, or CTAs to contact support**

**Automate Flows to send personalized messages that follow-up with customers to resolve open questions, point to self-service content, product registration, 'get started' tasks, information on benefits and usage, etc.**



MAE

Manufacturing



# OEM Proactive Service: Routine Maintenance

**As:** an original equipment manufacturer (OEM) service manager,

**When:** a customer has made a net-new purchase in the last X months or it's been Y months since the last service appointment,

**I want to:** proactively remind customers about maintenance before a critical need/emergency arises

**So that I can:** reduce service case volume and churn, and increase CSAT and customer retention.



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**Data lake/warehouse, unstructured:** product usage, telemetry, product maintenance manuals

**Sales/service:** purchase history, previous sales and service interactions, vehicle/equipment preference

**Marketing/commerce:** storefront engagement, email/web/mobile activity

**Calculated Insights:** propensity to churn, time since purchase, time since last service appointment, likelihood to need maintenance in X time

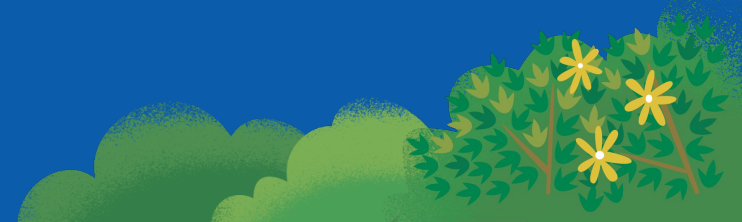
Power recommendations on next steps/services/complimentary products most relevant and likely to be needed by customer.

Via Marketing Cloud, generate brief for service campaign/journey, including target audiences and draft content

Configure Agentforce for autonomous product Q&A, appointment scheduling

**Automate Flows to send service messages** on preferred channels, outlining potential service needs with personalized discounts; give customers the option to get connected with dealers, instructions for self-service, etc.

# Communications, Media & Entertainment, Tech (CMT)





# Guided Digital Prospect Experience

**As:** a B2B technology marketing manager,

**When:** prospects are looking for more information about a given product/solution post-webinar, event, etc.

**I want to:** direct them to the 'next-best' step or content (via ads, web personalization) in their buying journey based on previous engagement

**So that I can:** increase lead conversion, qualified pipeline and return on ad spend.



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**Marketing:** web, advertising, email engagement

**Data lake/warehouse:** event data (badge scans, webinar attendance, etc.)

**Sales/service:** customer or account preferences, purchase history, buyer profile information

**Unstructured:** knowledge articles, product guides

**Calculated Insights:** propensity to buy X product, account-level propensity to buy based on opportunity stage

**Clean Rooms:** analyze current audience overlap with partners/publishers and ROAS across existing advertising activations; enrich unified profile data with 3rd-party partner data

Power **predictive product interest scores to prioritize recommendations for high-priority products** and complementary ones. Surface in Sales/Service.

Configure **Agentforce to assist with autonomous product Q&A, pricing and promotions**, directing prospects to relevant content, etc.

**Create targeted segments and activate to Google, Meta, Amazon, etc., for personalized ads** driving to owned digital properties

**Automate Flows to send personalized follow-up marketing messages** based on previous engagement, products owned, etc.

Via Marketing Cloud, **personalize return-visit web experience with product recs and offers**



# Software Adoption & Expansion

**As:** a software sales manager,

**When:** an existing customer gets close to a license/utilization threshold,

**I want to:** be notified, deliver personalized follow-ups, and automatically generate opportunities for license true-ups and self-service expansion

**So that I can:** increase seller productivity, win rates, revenue, and customer retention while decreasing support costs.



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**Sales/service:** customer or account preferences, purchase history, buyer profile information

**Analytics tools:** performance, forecasting data

**Data lake/warehouse:** telemetry, product usage

**Unstructured:** knowledge articles, product guides

**Calculated Insights:** customer lifetime value, propensity-to-buy / ranking

**Power customer health scoring** to inform next-best-action recommendations to sellers for tailored follow ups. Surface in Sales Cloud.

**Craft AI-powered email content** to share with customers about next steps for continued product usage and self-service license expansion

Leverage **Data 360-triggered Flows to automatically create expansion opportunities** and notify reps (e.g., via Slack) at certain utilization thresholds to inform outreach



# Sports Streaming: Real-Time Recommendations

**As:** as a marketing manager for a sports league with a streaming service/app,

**When:** a new customer subscribes to the service and creates a profile with team preferences,

**I want to:** leverage their profile information and engagement history to personalize outreach about their favorite teams, game updates, etc.

**So that I can:** increase CSAT, CLTV, and the likelihood of up-sell/cross-sell opportunities.



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**Data lake/warehouse, unstructured:** telemetry, streaming consumption/usage data, in-app engagement, player and team/franchise data

**Sales/service:** team and player preferences, channel preferences, past purchases, subscription information

**Marketing:** web, mobile, advertising engagement

**Calculated Insights:** propensity to churn, AOV rankings/tiers, likelihood to engage with X promotion

**Clean Rooms:** enrich unified profile data with 3rd-party partner data

Power **next-best recommendations for upcoming games to watch, different in-app viewing options, highlights and replays, etc.**

Configure **Agentforce for autonomous game, player, injury, highlights Q&A**

**Configure and automate Flows that send personalized email notifications or in-app recommendations for upcoming game that match subscriber interests**

Trigger **data actions/activations that personalize streaming app UI with highlights, content related to favorite teams and players**



# Off-Season Fan Engagement (E.g., Season Ticket Renewal)

**As:** sales manager for a sports league/franchise,

**When:** it's the period of time between the end of one season and the beginning of the next (off-season)

**I want to:** keep fans up-to-date with the team(s) and the latest offerings for the next season based on previous engagement/purchases

**So that I can:** increase customer lifetime value (CLTV), customer satisfaction (CSAT) and retention, and incremental revenue.



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**Marketing:** engagement data (email, ads, web)

**Data lake/warehouse, unstructured:** mobile app or streaming service usage, risk and regulatory guidelines/manuals

**Sales/service:** location, demographic info, subscriptions and purchases, previous interactions, previous ticket usage

**Calculated Insights:** fan engagement score/tier, customer lifetime value, propensity to buy, propensity to churn, likelihood to respond to upgrades or VIP offers

**Clean Rooms:** enrich unified profile data with 3rd-party partner data

Power **recommendations for personalized offers on season ticket purchases and upgrades.** Surface in Sales/Service Cloud.

Determine **next-best action for continued team engagement** across other digital properties (point to fantasy sports app).

Configure **Agentforce to assist with sales POV development, providing guidance on outreach, etc.**

Configure and automate Flows that send **personalized reminders about ticket renewals or team activations/events** on preferred channels

Create targeted segments and activate to **advertising partners like Google, Meta, Amazon to deliver personalized promotions on ancillary services** (e.g., fantasy app, betting platform, streaming service).

# Transportation, Travel, Hospitality (TTH)



# Thank you

