



CUSTOMER CASE STUDY / CUSTOMER ENGAGEMENT AND SALES

Nasdaq makes outreach personal and follow-up timely

Nasdaq uses TruCentive to start conversations and reconnect with customers. Salesforce integration lets sales teams send incentives independently from contact records, with real-time claim notifications to guide follow-up.

THE OPPORTUNITY

Create a welcome reason to reconnect

Across marketing outreach and customer reengagement programs, Nasdaq wanted an easy way to open a conversation. A thoughtful incentive could break the ice and give recipients a friendly reason to reconnect.

THE APPROACH

Give sales teams the tools to act

Sales teams send incentives directly from contacts in Salesforce, making outreach part of their familiar workflow. Each representative can act independently, supporting different programs from the same place.

A choice of coffee rewards makes the invitation feel personal. Real-time claim notifications give representatives a timely cue to follow up when a recipient has engaged with the offer.

THE EXPERIENCE

Independent teams with clear visibility

"TruCentive gives our team the autonomy to send incentives from Salesforce, with real-time visibility into delivery and claims. That makes engagement simpler and follow-up more timely."

Megan Brady, Head of Strategic Partnerships,
Data Americas, Nasdaq



Outreach connected to sales

Send from Salesforce

Incentives from contact records.

Act independently

Sales teams manage their outreach.

Real-time claim alerts

Claim alerts signal recipient activity.

A thoughtful icebreaker. A timely reason to reconnect.

Make customer outreach more personal with TruCentive.