

# Financial Services Leader Streamlines Customer Engagement with ServiceNow CRM + Tenon Marketing Automation



## The Challenge

A leading financial services and payments provider in Europe faced growing complexity in managing customer engagement across marketing, sales, and service. Customer data lived in disconnected systems, making it difficult to uncover insights, execute targeted campaigns, and measure effectiveness. The company needed a unified platform to bring all front-office teams together—with automation, segmentation, and insights built in.

## The Solution

To address this, the organization took a bold step by extending its use of ServiceNow—adopting Tenon’s marketing automation solution to fully consolidate its CRM on the NOW Platform. This strategic move unified the complete front office, centralizing customer interactions and data under one digital roof.

Using Tenon’s marketing automation solution, built natively on ServiceNow, the company connected teams across the entire engagement lifecycle. Sales reps, marketers, and service agents now work from the same real-time record of truth—eliminating the swivel-chair effect between disconnected tools.

## The Impact

This transformation empowers the business to:

- Replace fragmented tools with a single automated platform
- Enable behavioral segmentation for more relevant, timely campaigns
- Reduce manual workload and improve campaign speed-to-market
- Increase data transparency and trust across marketing, sales, and support

This collaboration between Tenon and ServiceNow is more than a tech upgrade—it’s a CRM strategy for growth. By unifying marketing automation, sales processes, and service workflows, this financial services leader is now better positioned to serve customers with relevance, speed, and continuity.

Together, Tenon and ServiceNow CRM have helped this organization set a new standard for customer engagement in regulated markets.

## At a Glance

- Industry: Financial Services / Digital Payments
- Region: Europe with market focus in Italy
- Employees: 1,000+
- Customer Base: 1M+ active wallet users

## Challenges

- Disparate tools like MailChimp and Microsoft Dynamics
- Manual campaign execution
- Limited visibility into customer behavior, purchase patterns, or registration status
- A lack of integration between marketing, sales, and customer service systems
- Difficulty creating behavioral segments or triggering upsell and cross-sell campaigns

## Benefits

- Launch campaigns with instant visibility into customer preferences
- Track sales opportunities alongside engagement history
- Resolve service cases with marketing and transaction context

## Contact

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