

salesforce

## Fan Engagement

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# What is Fan Engagement ?



# What is Fan Engagement ?

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When we talk about fan engagement, generally, we consider all those activities, initiatives, strategies undertaken by the club to manage the relationship with its fan base, maximizing on the one hand the value offered to supporters and on the other the value generated by this relationship, also in the form of commercial returns for the company.

In recent years, thanks to the transformation of the sports sector (and football in particular) to a real entertainment business, the opening towards international markets, the development of new digital technologies and various other variables, the way in which the club interacts with its fan base has profoundly changed, the tools available and the levers used to manage and strengthen this relationship have changed.





# From CRM to FRM



Every fan is a potential customer who is the basis of the economic model of the clubs.

The CRM approach is becoming increasingly strategic also for sports clubs that, only in recent years, have perceived the importance of data and analytics as the key to the club fan relationship.

Every fan is a potential customer who is the basis of the economic model of the clubs. the main reason for this evolution lies in the fact that clubs arouse in people, in a natural way, what thousands of brands try to achieve with great effort: passion, involvement, emotion, loyalty.

Fans fill  
stadiums  
and arenas

Fans buy  
merchandising

Fans attract  
sponsors



# Why now ? What's changed ?



**There's mounting competition** from all areas of the entertainment market for every fan's time and clubs are having to compete using smaller marketing teams and budgets. Internationally, club loyalty can also be fluid, with the potential for fans to switch allegiances if a club doesn't engage them closely enough.

The way sports fans consume media is also changing. Streaming the action digitally with social media commentary on a connected mobile device now complements televised live events. This rise of the second screen is expanding the sports content ecosystem. A direct-to-consumer approach is transforming broadcasting. Corporate studios within sports clubs now create new and exciting content around matches and players. Many more are expected to go direct to their fans with content and broadcasting strategies in the years ahead.

This has huge implications for fan engagement. At the same time, an engaged, tech-savvy fan base want more from their club in terms of access and content, and they want it from teams and leagues direct, via digital. This is leading to a new breed of super-fan, which exhibit obsessive engagement.

With the emergence of dedicated content, social media feeds, podcasts, video clips, webchat, and e-sports it's easier for fans to be engaged 24/7. This multichannel approach is also helping clubs create new and meaningful ways to engage fans and generate revenue.

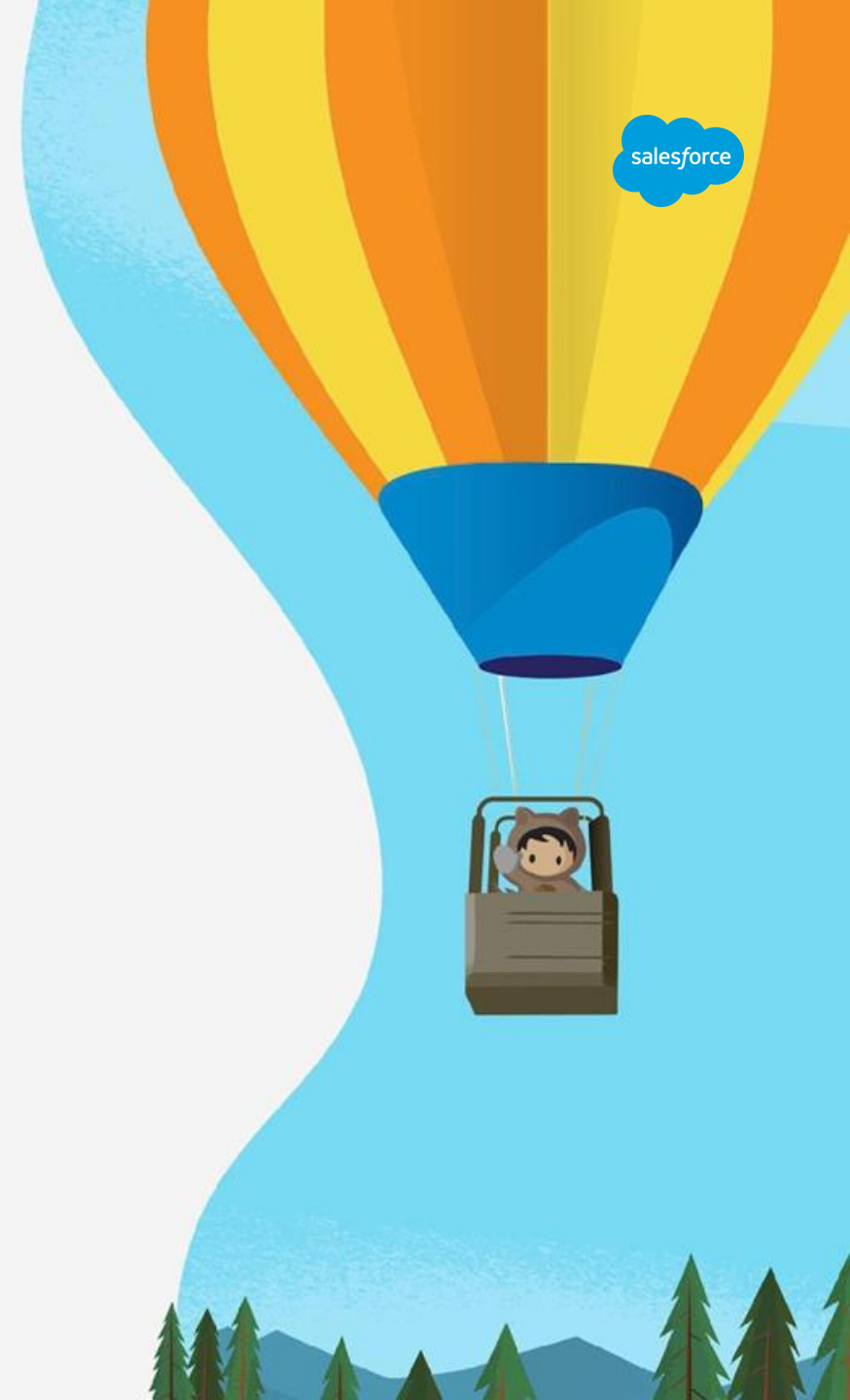


# The impact of a pandemic

It is difficult to ignore the impact that recent times have had on sport. Broadcasting, commercial and matchday revenues have been hit hard or are at risk. The crisis has forced clubs to diversify their sources of revenue. Commercial revenues such as merchandise and those from sponsors have never been so important. The pandemic has also caused a massive re-evaluation into what fan engagement really means for clubs. It will not look the same again.

Clubs have had to deliver value and relevance to both fans and partners during the crisis, when no sport has been played. It's been a major challenge. Some, such as Everton FC, have upped their outreach efforts to support fans, reconnecting with their local community and those at risk.

Sport has also proved to be an effective driver of social impact. At the same time eSports and video gaming have risen in importance. In order to achieve all this, clubs have had to invest in new strategies, which rely on people, skills, and technology.



## What's the opportunity ?

Clubs can do much better at monetising fans beyond ticket sales. Sponsors increasingly talk about fan value. That's because some sports teams are generating additional, non-core revenues, moving beyond merchandise or stadium ancillaries, such as food and beverage sales, to focus on sponsor-activated content, gamified experiences, match-day hotel nights and post-game dining and hospitality.

Today, at the heart of a successful fan engagement strategy is the ability to convert a casual follower into a loyal, paying fan. The more engaged a fan is, the greater the potential there is to monetise them across multiple channels.

Sponsors are now becoming increasingly sophisticated with their marketing and have higher expectations when signing partnership deals. Offering credible, granular access to an engaged fan base is crucial. Those clubs that get it right can charge a premium for sponsorship deals. It's also important to create opportunities that monetise consumers at every stage of their fan journey.

At the heart of this, sits data. Those sports clubs that can access richer data sets are winning. It gives them a better understanding of their fans, but this can also be relayed to sponsors.

They're now far more interested in putting their name to a piece of likeable, shareable content rather than a static pitchside billboard seen on TV.



# Fans at the matches

**Engaged local fans** attend more home games and buy more merchandise. There are two elements that are key to maximising revenue from these fans: make sure they come to as many matches as possible and cross-sell beyond ticketing.

The season ticket renewal campaign is crucial since this allows year-round engagement and a deeper connection with a club. Once sold in a reactive way, tickets are now proactively sold using customer relationship management (CRM) systems. Renewal campaigns involve hundreds of thousands of emails and texts. Personalised engagement is key and social selling has also become a [necessity](#).

Software can now track engagement. If a season ticket holder misses a few matches, this can be flagged and they can be contacted about their absence. This is done in order to improve a particular fan's experience, so they aren't lost. Non-season ticket holders also need to be persuaded to

spend a Saturday afternoon at the match rather than in a bar. Personalised omnichannel messaging is critical to persuading the undecided [fan](#).

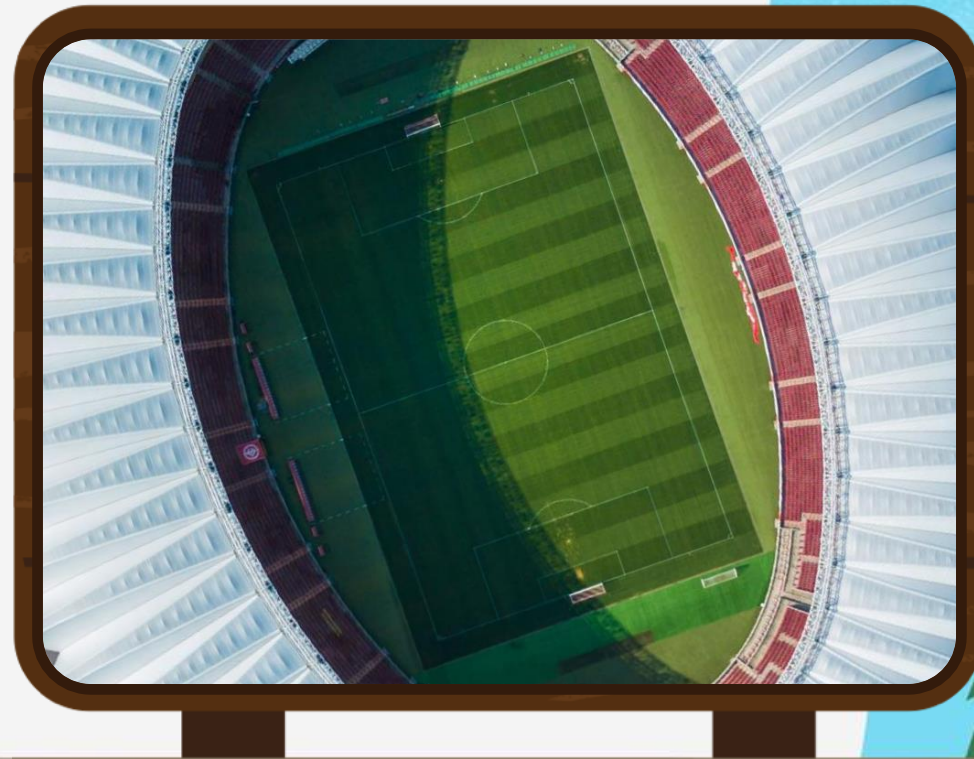
Cashless stadium purchasing combined with CRM systems also allow for a single view of the fan. It gives a fuller picture of the fan journey during an event – from car park to in-stadium purchases, such as ancillaries, food and beverages, as well as merchandise. This data can be used to tailor fan experiences more effectively. Olympique Lyonnais do this well with their MYOL [card](#).

There's a huge opportunity to deliver a fantastic experience beyond the action on the pitch, whilst also increasing the average revenue per fan. In the days before the game, the most innovative clubs tempt fans to sign up to hospitality packages, encouraging them to visit sponsor stands before the game or provide one-off discount vouchers for the club store.

# Sponsors: why is fan engagement important for them ?

**Sponsors are looking to leverage** their brand through marketing campaigns with a club by accessing fan data in a GDPR-compliant way. The more data a club has about its supporters, the more valuable the partnership is to both parties. Yet brands must have a clear purpose when it comes to fan engagement, based on a value proposal that is relevant to the audience.

For sponsors it's also important to know what fan journeys look like and each potential touchpoint. This allows clubs to understand exactly where and when a brand can interact in the fan customer journey to present their message. It is important for a brand to know where it can fit in the fan engagement picture and be successful.



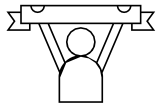
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A well-operated club can easily offer data analyses to prospective sponsors. They're able to deliver a target audience relevant to a brand.

For instance, Olympique Lyonnais can demonstrate to a global car manufacturer, which fans were thinking of purchasing, their timeline, and specific needs

# Capturing the brand opportunity

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## **Build a vision that starts with the fan**

What does the ultimate experience and engagement look like for different fan groups?



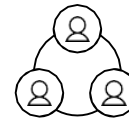
## **Engage the completely unknown fans**

Encourage engagement with the club directly. D2C club content is part of this process.



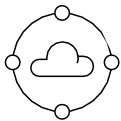
## **Identify what needs to change to deliver this vision**

Why aren't you delivering? Is it due to organisation, processes, culture or technology?



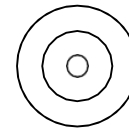
## **Engage the pseudonymous fans**

Can be drawn in via social media and through web advertising, encourage data capture.



## **Build a tech stack to enable the vision**

Firstly you need to create a single view of each fan across internal and third-party systems.



## **Engage the known fans**

Deliver personalised, relevant communications to each fan. Content and engagement is king.



## **Monetise the fan**

Through merchandise, ticketing, TV subscriptions and higher value partnerships.





# Football Competitions included in this overview

FIRST DIVISION

20 CLUBS



## SERIE A

SECOND DIVISION

20 CLUBS



## Lega B

ITALY



## ITALY SnapShot / First Division



**20**

**CLUBS**

Total Serie A football clubs analysed.

**10**

**BRANDS**

Total Serie A Sport Brands on jerseys analysed.

**237.0 M**

**+ 0.37%\***

**FANS**

Total Facebook, Twitter, Instagram, YouTube Fans of the Serie A football clubs analysed.

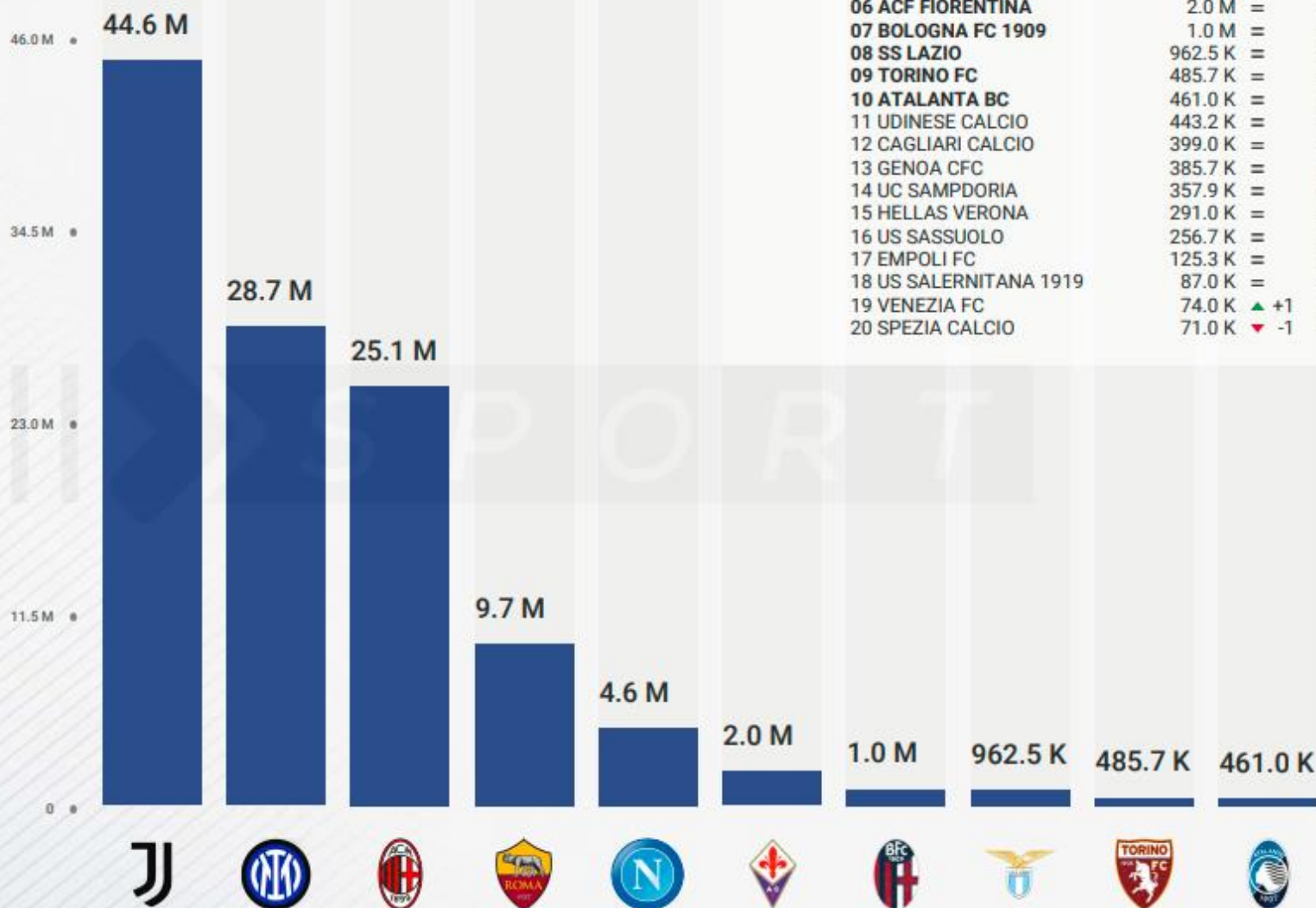
\*[from October 04, 2021 to November 02, 2021]



f  
TOTAL FANBASE  
120.2 M



Ranking of the most followed  
Serie A football clubs on Facebook.

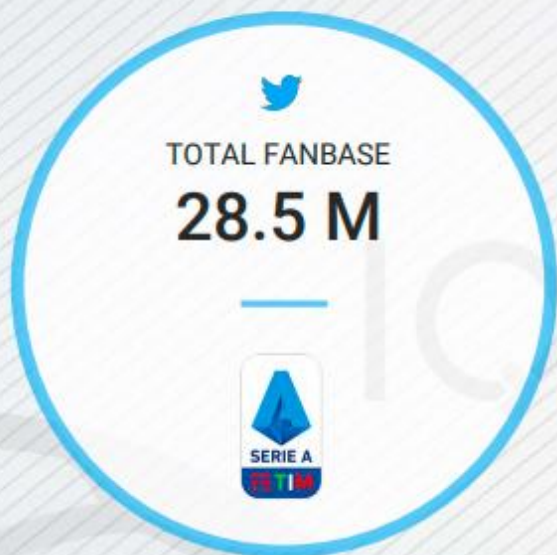


\*[from October 04, 2021 to November 02, 2021]

We now consider FB Likes only. This may cause an alteration of the %VAR, as we considered Followers in the previous issue, in some cases.

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FB data refers to Likes, not Followers.



Ranking of the most followed Serie A football clubs on Twitter.



\*[from October 04, 2021 to November 02, 2021]

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TOTAL FANBASE  
81.8 M



Ranking of the most followed Serie A football clubs on Instagram.



\*[from October 04, 2021 to November 02, 2021]

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TOTAL FANBASE  
6.5 M



Ranking of the most followed Serie A football clubs on YouTube.



\*[from October 04, 2021 to November 02, 2021]

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TOTAL FANBASE  
**237.0 M**



Ranking of the most followed Serie A football clubs based on the aggregate Facebook, Twitter, Instagram, YouTube fanbases.



\*[from October 04, 2021 to November 02, 2021]

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FB data refers to Likes, not Followers. YT data is rounded (since provided in this format); this may alter variations.





TOTAL FANBASE

**237.0 M**



Potential Social Media exposition of the Sport Brands on jerseys in relation to the total fanbase of the 20 sponsored Serie A football clubs.



\*[from October 04, 2021 to November 02, 2021]

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CLUBS

**20**

SPORT BRANDS

**10**

Sport Brands on jersey coverage in relation to the 20 sponsored Serie A football clubs.



\*[from October 04, 2021 to November 02, 2021]

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Ranking of the most grown up Serie A football clubs based on the aggregate Facebook, Twitter, Instagram, YouTube fanbases.



\*[from October 04, 2021 to November 02, 2021]

We now consider FB Likes only. This may cause an alteration of the %VAR, as we considered Followers in the previous issue, in some cases.

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FB data refers to Likes, not Followers. YT data is rounded (since provided in this format); this may alter variations.



# Executive Summary.



## LaLiga giants Real Madrid and Barcelona retain gold and silver

**Real Madrid** remains the most valuable football club brand in the world for the third consecutive year, despite recording a 10% brand value decline to €1,276 million. The club still maintains a slight lead ahead of fierce rivals Barcelona in second spot, with a brand value of €1,266 million, also declining by 10% this year. While the LaLiga giants remain on the podium for 2021, it has now been three years since a LaLiga club has reached the final of the UEFA Champions League, with the last appearance being Real Madrid's victory over Liverpool in 2018. Despite this, both Spanish clubs have consistently been able to secure Champions League qualification year after year, with the last time either club failed to reach the groups stages now more than 20 years ago. This consistent influx of Champions League revenues and status has played a central role in both clubs' overall success.

## Top 10 most valuable club brands

Close behind Real Madrid and Barcelona, **Manchester United** has retained third place despite suffering a 14% decline in brand value to €1,130 million. The club will be looking to capitalise on a stronger season under Solskjaer - securing second place in the Premier League and booking their place in the Europa League Final against Villarreal on 26<sup>th</sup> May - as well as re-establishing themselves as League contenders and a powerhouse within Europe. Neighbours and bitter rivals **Manchester City** are now just 1% (€12 million) behind Manchester United in

**The origin and demise of the European Super League is a story of branding – the 12 clubs considered their brands too strong and attractive to be sanctioned by other associations, and above the footballing pyramid that validates their success. However, the communication, promotion, and positioning of the project were poorly executed, fuelling a backlash from all stakeholders, leading to the dissolution of the group, and resulting in painful brand damage.**

**Hugo Hensley**  
Head of Sports Services, Brand Finance

## Top 10 Most Valuable Brands

	<b>1</b> $\leftarrow 1$	
2021: €1,276m		-10.1%
2020: €1,419m		
	<b>2</b> $\leftarrow 2$	
2021: €1,266m		-10.4%
2020: €1,413m		
	<b>3</b> $\leftarrow 3$	
2021: €1,130m		-14.0%
2020: €1,315m		
	<b>4</b> $\uparrow 5$	
2021: €1,118m		-0.6%
2020: €1,124m		
	<b>5</b> $\uparrow 6$	
2021: €1,068m		+1.1%
2020: €1,056m		
	<b>6</b> $\downarrow 4$	
2021: €973m		-22.9%
2020: €1,262m		
	<b>7</b> $\uparrow 7$	
2021: €887m		-8.2%
2020: €967m		
	<b>8</b> $\leftarrow 8$	
2021: €769m		-19.0%
2020: €949m		
	<b>9</b> $\leftarrow 9$	
2021: €723m		-7.7%
2020: €784m		
	<b>10</b> $\leftarrow 10$	
2021: €675m		-6.2%
2020: €719m		

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brandirectory.com/football

brand value - the closest the two clubs have ever been in their history. Within the top 10, only Manchester City in 4<sup>th</sup> (down 1% to €1,118 million) and Bayern Munich (up 1% to €1,068 million) in 5<sup>th</sup> avoided significant brand value decreases, resulting in both clubs climbing one spot in the ranking.

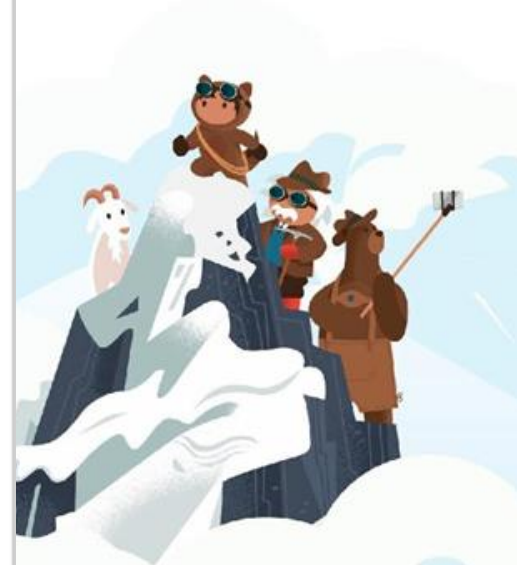
**Liverpool**, which had seen a resurgence under Jürgen Klopp, winning both the 19/20 UEFA Champions League and claiming the English Premier League title last year, have struggled this year, finding themselves battling for a place in next year's Europa League. This, coupled with the impacts of COVID-19, has caused the club to suffer a 23% decrease in brand value to €973 million, seeing them fall from 4<sup>th</sup> to 6<sup>th</sup> in the rankings. Resecuring their position in Europe's premier knock-out competition will be critical in driving future growth.

**PSG** (down 8% to €887 million) in 7<sup>th</sup>, **Chelsea** (down 19% to €769 million) in 8<sup>th</sup>, **Tottenham** (down 8% to €723 million) in 9<sup>th</sup>, and **Arsenal** (down 6% to €675 million) in 10<sup>th</sup> have all retained their positions in the top 10, with declines in brand value recorded across

## Brand Value Change 2020-2021 (%)

	-42.6%	35.4%	
	-40.6%	28.3%	
	-35.4%	25.8%	
	-29.1%	18.3%	
	-28.8%	12.0%	
	-28.0%	11.6%	
	-26.8%	11.4%	
	-26.4%	10.8%	
	-24.3%	7.8%	
	-22.9%	1.5%	

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## Bayern takes the lead in brand strength and enterprise value

The damage that the disastrous ESL has inflicted on Europe's elite, combined with their stellar performance on the pitch, has propelled Bayern Munich to become the strongest football club brand in the world, with a brand strength score of 91.9 out of 100 and the corresponding elite AAA+ rating.

Bayern's performance has been unrivalled over the past year, winning the sextuplet of the Bundesliga, DFB Cup, UEFA Champions League, UEFA Super Cup, FIFA Club World Cup, and DFL Super Cup, ultimately leading them to be named the Laureus World Team of the Year for 2021. They are the first team ever to lift the Champions League with a 100% record, which included an 8-2 win over Barcelona.

Bayern's leading brand strength score has contributed to an increase in brand value to €1,068 million and climbing up to 5th position overall in the ranking. The club's enterprise value has also rocketed up by nearly €300 million to €3,606 million, allowing them to take the crown in that ranking too, recording an 8% increase year-on-year. Sometimes it pays off to be the nice guy with Bayern leading the figures for commercial revenue generation of any football team at €360.5 million, a key contributing factor to the year-on-year increase in enterprise value. Real Madrid, Liverpool, Manchester United and Manchester City round up the top five for enterprise value.

## Clubs hoping to sack COVID-19 in the 21/22 season

Clubs have continued to lose out on key ticketing and other matchday revenue as COVID-19 has kept doors closed to the majority, with only small groups of fans able to attend a handful of fixtures over the campaign. The pandemic also brought many sponsorship deals under the microscope as football was put on hold for a portion of 2020, meaning uncertainty vested in whether sponsors would enjoy the brand exposure, activation, and return they had originally expected. The adverse impact has been felt across the top 50 club brands with average brand value declining by 11.2% versus a 2.2% drop last year.

Clubs and fans alike will undoubtedly be eager to see stadiums filled again, with some suggestions that stadiums may be allowed to accommodate as much as

### Top 10 Strongest Brands

	<b>1</b> ↑ 5	
	2021: 91.9 AAA+ +0.5	
	2020: 91.4 AAA+	
	<b>2</b> ↓ 1	
	2021: 91.3 AAA+ -3.6	
	2020: 94.9 AAA+	
	<b>3</b> ↓ 2	
	2021: 91.1 AAA+ -2.5	
	2020: 93.6 AAA+	
	<b>4</b> ↓ 3	
	2021: 89.0 AAA -4.2	
	2020: 93.2 AAA+	
	<b>5</b> ↓ 4	
	2021: 88.7 AAA -2.8	
	2020: 91.5 AAA+	
	<b>6</b> ← 6	
	2021: 86.2 AAA -2.8	
	2020: 89.0 AAA	
	<b>7</b> ← 7	
	2021: 86.2 AAA -2.6	
	2020: 88.8 AAA	
	<b>8</b> ↑ 11	
	2021: 85.3 AAA -0.3	
	2020: 85.6 AAA	
	<b>9</b> ↓ 8	
	2021: 84.9 AAA -2.7	
	2020: 87.6 AAA	
	<b>10</b> ↑ 13	
	2021: 84.8 AAA +0.5	
	2020: 84.2 AAA-	

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### Top 10 Club Enterprise Values

	<b>1</b>	
	2021: €3,606m +8.3%	
	2020: €3,329m	
	<b>2</b>	
	2021: €3,571m -14.79%	
	2020: €4,198m	
	<b>3</b>	
	2021: €3,311m -10.6%	
	2020: €3,702m	
	<b>4</b>	
	2021: €3,057m -20.6%	
	2020: €3,849m	
	<b>5</b>	
	2021: €2,936m -12.2%	
	2020: €3,346m	
	<b>6</b>	
	2021: €2,877m +4.7%	
	2020: €2,748m	
	<b>7</b>	
	2021: €2,829m -16.5%	
	2020: €3,387m	
	<b>8</b>	
	2021: €2,416m -2.9%	
	2020: €2,488m	
	<b>9</b>	
	2021: €2,072m -2.0%	
	2020: €2,114m	
	<b>10</b>	
	2021: €1,768m -12.8%	
	2020: €2,051m	

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The German 50+1% supporter shareholding model means that the fan is respected as the ultimate stakeholder. This has kept Bayern Munich out of the European Super League fiasco, while on-pitch performance has further boosted the brand's strength. This is a positive signal for future sponsorship performance, and Bayern is already the football club with highest commercial revenue in the world – these factors all come together to boost brand and business value.

Hugo Hensley  
Head of Sports Services, Brand Finance



# SeSa Group



# Group Structure and Market Position

**SeSa Group is a leading Italian digital services and solutions provider**

**Consolidated revenues over Eu 2 Bn and ~ 3,500 employees<sup>1</sup>**

**Key player driving digital transformation to the Italian economy  
Technology, digital services and business applications embracing new digital trend**

Corporate 

Group Governance, Strategy, Human Resources, Finance and Control, Legal, ICT, Operations, M&A through the **parent company SeSa S.p.A.**

Revenues ~ Eu 20 Mn, ~ 200 human resources<sup>1</sup>

Value Added Distribution («VAD»)  **computer gross**

Value-added distribution (“VAD”) with over 15,000 business partners through the **fully owned company Computer Gross S.p.A.** (“CG”).

Revenues ~ Eu 1.6 Bn, Ebitda margin ~ 4% , ~ 420 human resources<sup>1</sup>

Business Services («Base Digitale»)  **BaseDigitale**

Business Services and Business Process Outsourcing, focused on Financial Enterprise, through the **controlled company Base Digitale S.p.A.**

Revenues ~ Eu 47 Mn, Ebitda margin ~ 6%, ~ 410 human resources<sup>1</sup>

Software and System Integration («SSI»)  **VARGROUP**

Software, System integration, digital services with a customer base of 12,000 SMEs and Enterprises, through the **fully owned company Var Group S.p.A.** Revenues ~ Eu 480 Mn, Ebitda margin ~ 11.5%, ~ 2,500 human resources<sup>1</sup>

(1) Financial Statements as of April 30, 2021



# Organic growth embracing new digital trends

## Human resources development as strategic driver of Group sustainable long-term growth



### Hiring

Professional skills in main digital transformation trends (cloud, security, analytics, A.I.).  
**Recruiting programs with 400 new qualified employees in FY2021 (o/w 200 under 30). 99% of people under permanent employment**



### Education

Education programs to develop human resources skills and **habilitate innovation technology** (26,302 hours in FY2021 vs 20,017 in FY2020 vs 18,089 in FY2019)



### Welfare

Corporate **welfare programs** aimed at increasing HR wellness and work-life balance, supported by non-profit foundation "Fondazione Sesa".  
Reinforcement of welfare programs after Covid-19 towards sustainability



### Social Responsibility

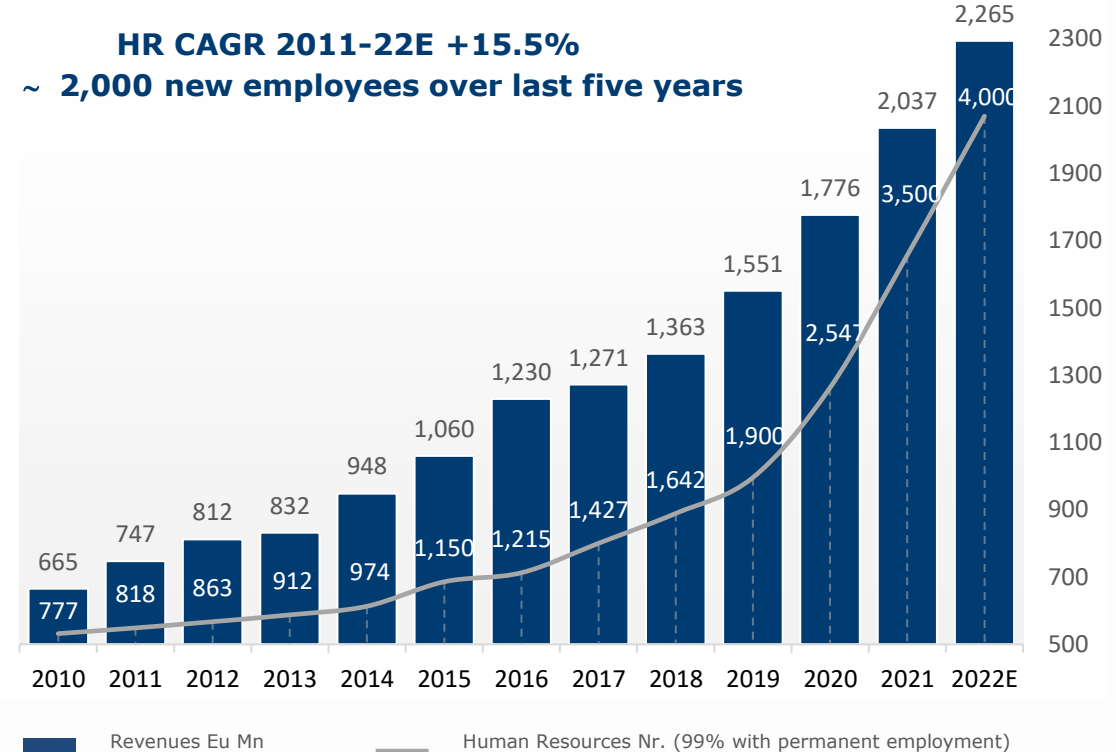
Commitment to **sustainable growth and value generation** towards all stakeholders (human resources, environment, social communities and shareholders)

## Digital Enabler of Italian enterprises

**Focus on main digital innovation trends:** Collaboration, Cloud, Security, Data Science.

**~ 75% of historical growth is organic and driven by human resources development o/w ~ 10% in foreign European countries**

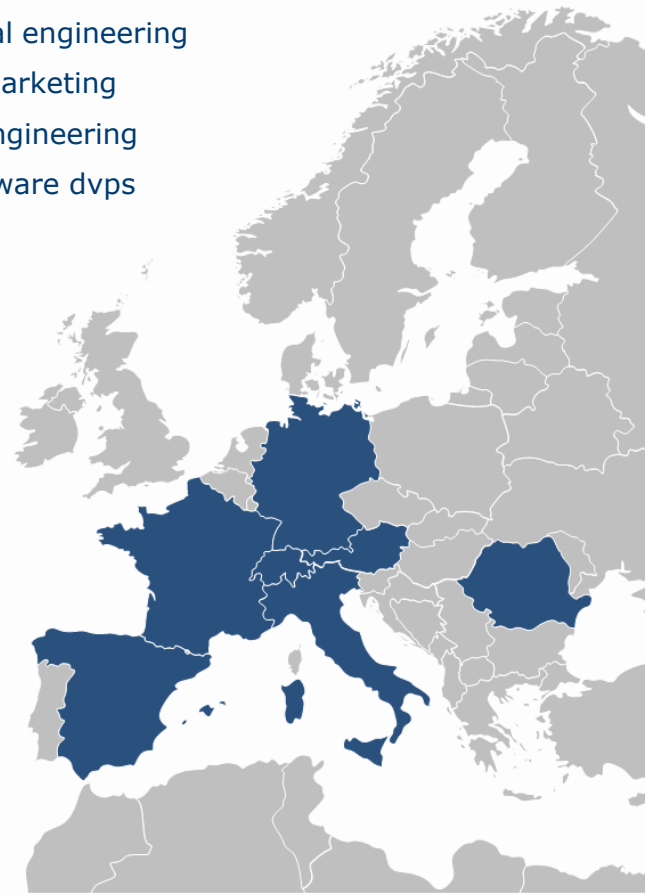
**HR CAGR 2011-22E +15.5%**  
**~ 2,000 new employees over last five years**



# High Skills on Digital Transformation trends in different geographies



Italy 3,215  
France, Switzerland and Austria ~ 15 dgt engineering, managed svcs  
Germany 70 digital engineering  
China 40 digital marketing  
Spain 20 digital engineering  
Romania 140 software dvps



# Sesa Group and Sustainability Programs

## SUSTAINABILITY GOVERNANCE ACHIEVEMENTS

- Mission to create sustainable value for all stakeholders
- Integration of sustainability in corporate bylaws in January 2021
- Sesa Group certification SA 8000 from Year 2015
- UN Global Compact for CSR since Year 2020
- Acquisition of Ecovadis CSR rating in May 2021
- B Corp Certification, Phase A completed (B impact assessment)

## HUMAN RESOURCES AND WELFARE

- Welfare programs for Group Human Resources strength in 2021 (new Welfare program launched in June 2021)
  - contribution to scholarships and studies for employees' children
  - sustainable mobility program
  - contribution to employees well being and education activities
  - work-Life Balance programs
- Progressive adoption of ESG targets for Group key people
- 26,302 education hours in FY 2021 (+30% Y/Y)
- Enhancement of diversity and inclusion programs
- Building facilities and digital organization for work-life balance

## ENVIRONMENTAL RESPONSIBILITY

- Efficiency programs to reduce natural resources consumption
- Renewable energy production in Fiscal Year as of April 30, 2021 equal to 847,085 kWh (+210% Y/Y)
- Energy supplies converging to 100% green within December 2021
- Group Carbon Neutrality program within Year 2030
- Environmental certification UNIEN ISO 14001 since May 2021

## SOCIAL AND ECONOMIC DEVELOPMENT

- Generating value in a responsible way to social communities
- To support digital transformation as crucial driver of enterprises and organizations path to sustainability
- SeSa Foundation: non-profit organization dedicated to philanthropy, education and welfare (strongly involved in fight against pandemic emergency)
- SeSa Foundation vaccine logistic hub based in Empoli (Florence) for COVID 19 vaccination campaign



**Success from anywhere**





# Guided by Our Core Values

## Trust

We are committed to trusted stakeholder relationships, reliable infrastructure, and data privacy

## Customer Success

We guide our customers to deliver transformative outcomes and mutual success

## Innovation

We apply a beginner's mind, creativity, and continuous learning to disrupt and transform

## Equality

We are committed to being active allies. We strive for a more equal, inclusive, sustainable, and better world.



# Doing Well and Doing Good, Together

salesforce

## Leader In Philanthropy



TOP 50  
COMPANIES  
THAT CARE  
**People**



MOST  
SUSTAINABLE  
COMPANIES  
**BARRON'S**

## Leader In Culture



WORLD'S  
MOST ADMIRER  
**FORTUNE**



WORLD'S  
BEST WORKPLACE  
**Great Place To Work**

## Leader In Innovation



CHANGE THE  
WORLD LIST  
**FORTUNE**



FUTURE 50  
TOP 10  
**FORTUNE**

FY21

**\$21.25B**

**\$1.7B**  
FY11

**\$2.3B**  
FY12

**\$3.1B**  
FY13

**\$4.1B**  
FY14

**\$5.4B**  
FY15

**\$6.7B**  
FY16

**\$8.4B**  
FY17

**\$10.5B**  
FY18

**\$13.2B**  
FY19

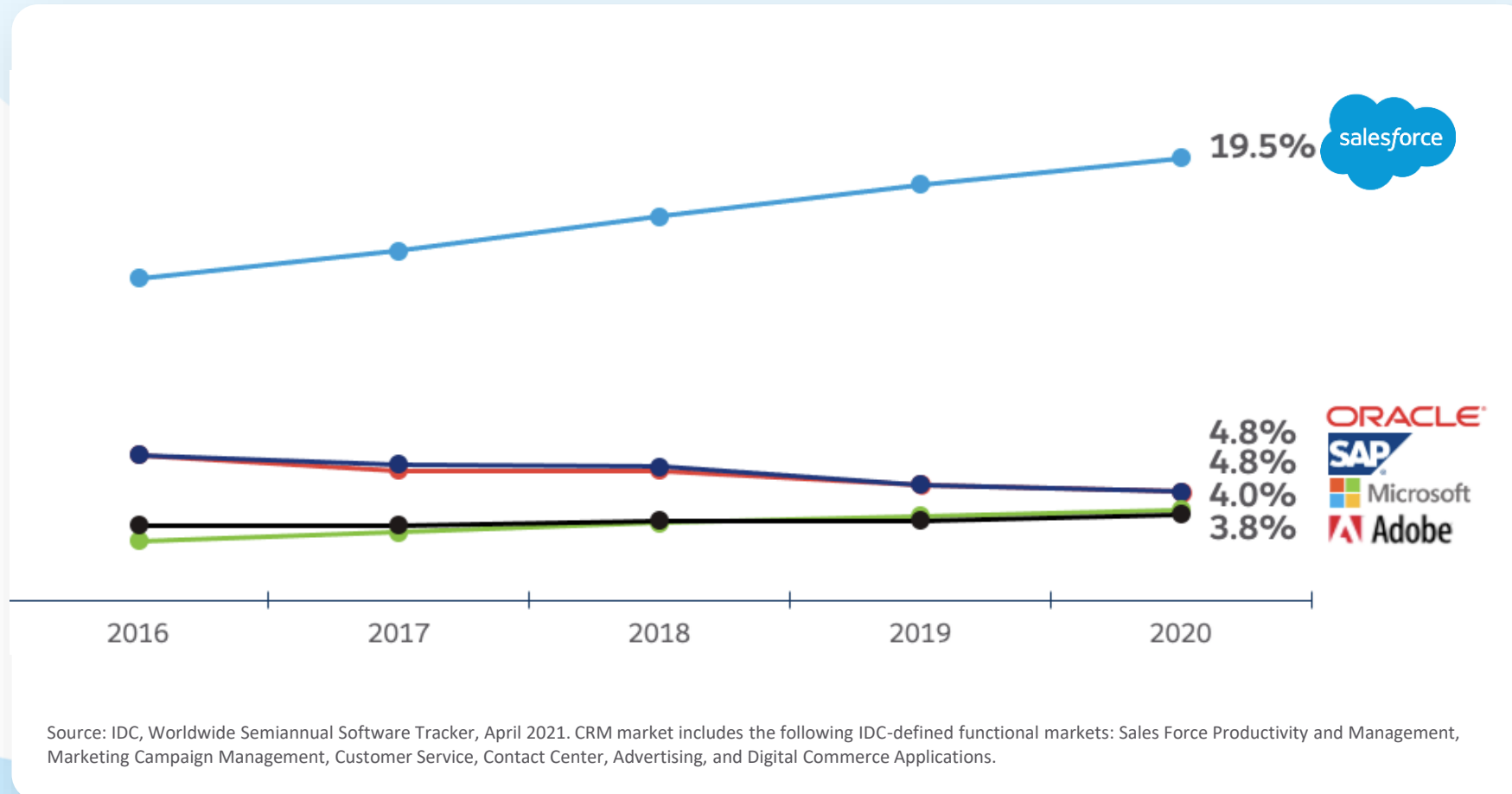
**\$17.2B**  
FY20

\*From People, August 2020  
Meredith Corporation.Used under License.



# Salesforce: #1 CRM

Worldwide CRM applications 2020 revenue market share by IDC



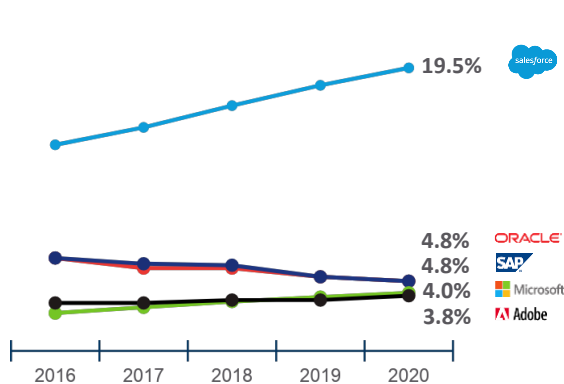


# Salesforce: #1 CRM

## Worldwide CRM applications 2020 revenue market by IDC

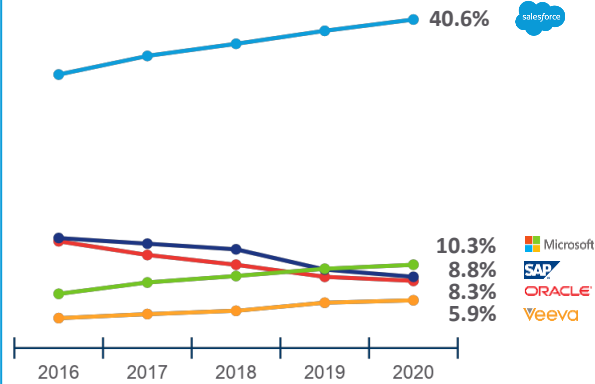
### #1 in CRM

Worldwide CRM applications 2020 revenue market share by IDC



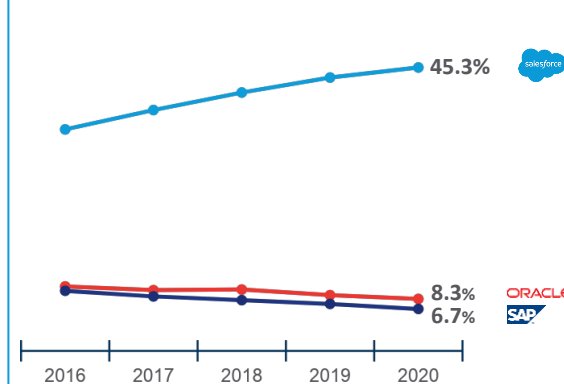
### #1 in Sales

Worldwide sales force productivity and management applications 2020 revenue market share by IDC



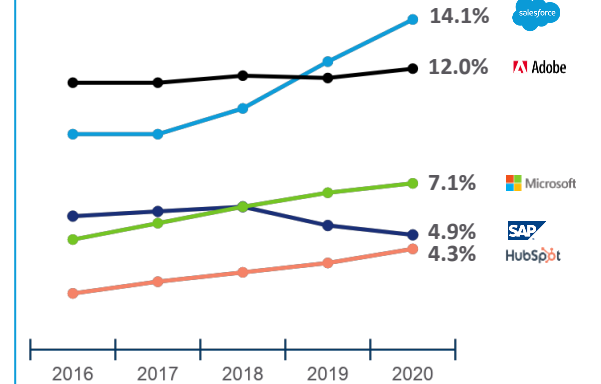
### #1 in Customer Service

Worldwide customer service applications 2020 revenue market share by IDC



### #1 in Marketing

Worldwide marketing campaign management applications 2020 revenue market share by IDC



Source: IDC, Worldwide Semiannual Software Tracker, April 2021. CRM market includes the following IDC-defined functional markets: Sales Force Productivity and Management, Marketing Campaign Management, Customer Service, Contact Center, Advertising, and Digital Commerce Applications.

# Salesforce: #1 Partner for Digital Transformation



Sales



Gartner Magic Quadrant for Sales Force Automation, 2020

Leader 14 Years in a Row



Service



Magic Quadrant for CRM Customer Engagement Center, 2020

Leader 12 Years in a Row



Marketing



Magic Quadrant for Multichannel Marketing Hubs, 2020

Recognized as a Leader



Commerce



Magic Quadrant for Digital Commerce, 2020

Recognized as a Leader

# 2020 Gartner Magic Quadrant for Sales Force Automation



## Gartner®

Magic Quadrant for Sales Force Automation

28 July 2020

Analyst(s): Theodore (Tad) Travis,  
Adnan Zijadic, Ilona Hansen, Melissa Hilbert

Figure 1. Magic Quadrant for Sales Force Automation



Source: Gartner (July 2020)

A LEADER  
**14** Years in  
a row

This graphic was published by Gartner, Inc. as part of a larger research document and should be evaluated in the context of the entire document. The Gartner document is available upon request from Salesforce. From 2007-2014 Salesforce was recognized as salesforce.com.

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# A Strategic Partner, Not a Supplier

Fueling Your Growth



The List

Filter list by: Rank Company All regions All industries

Rank	Company
#1	ServiceNow
#2	Workday
#3	Salesforce
#4	Tesla

The List

Spreadsheet Reprints Logo Use

Filter list by: Rank Company All regions All industries Search by company name

Rank	Company	Country	12-Month Sales Growth	Innovation Premium
#1	Tesla Motors	United States	23.35503728%	82.4%
#2	Salesforce.com	United States	25.00310623%	75.5%
#3	Regeneron Pharmaceuticals	United States	36.88172524%	72.9%
#4	Incyte	United States	46.0699371%	70.8%

The List

Spreadsheet Reprints Logo Licensing

Filter list by: Rank Company All regions All industries Search by company name

Rank	Company	Country	12-Month Sales Growth	Innovation Premium*
#1	Salesforce.com	United States	25.87%	82.46%
#2	Tesla	United States	73.01%	78.43%
#3	Amazon.com	United States	27.08%	72.78%
#4	Shanghai RAAS Blood Products	China	15.27%	71.72%

# The Salesforce Economy

salesforce



Global Jobs  
**4.2M**

New Salesforce  
economy jobs by 2025

Global  
Economic Impact  
**\$1.2T**

New business  
revenue by 2025



Source: IDC white paper sponsored by Salesforce, The Salesforce Economic Impact: 4.2 Million New Jobs, \$1.2 Trillion of New Business Revenues from 2019 to 2024, October 2019. The statements are based on the data from 2019 through 2024.

# SALESFORCE ECONOMY

Da un'indagine di IDC\*

Per **1€** investito ci sono **6,5€** di ritorno



**4,2 milioni**  
di posti di lavoro  
entro il 2024

**1.200 miliardi**  
di dollari di fatturato  
generato entro il 2024

**21.360**  
nuovi posti di lavoro  
diretti entro il 2024

**43.000**  
nuovi posti di lavoro  
indiretti entro il 2024

Ogni dollaro prodotto da  
Salesforce ne  
vengono guadagnati  
**6,43**  
dall'ecosistema  
che vi ruota  
attorno

**10,1 miliardi**  
di dollari di fatturato  
generato entro il 2024



# We're in the Midst of Unprecedented Times

salesforce

## Health Crisis



## Social Justice Crisis



## Environmental Crisis



## Economic Crisis



## Leadership Crisis



**69 %**  
believe work is  
permanently changed



# The Success from Anywhere Imperative

Trusted relationships  
and technology

Work from anywhere, accelerating the  
digital transformation

Investment in  
All Stakeholders

69%

believe the pandemic will forever change  
the way they work

salesforce



# Success from Anywhere is Hard

**Mistrust of Data Security & Privacy**

**Legacy Systems**

**Data Silos**

**Health & Safety**

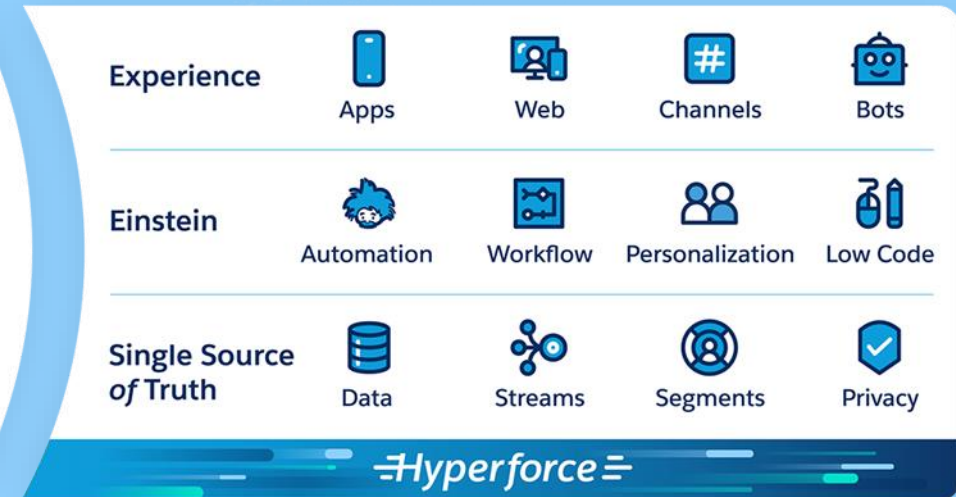




# Salesforce Customer 360

salesforce

Trailblazer Success & Community • #1 CRM • Fast Time to Value • Flexible & Scalable • Work From Anywhere



# Our Technology Model

Enterprise cloud computing



**Fast**



No Hardware  
No Software  
Faster ROI

**Innovative**



Flexible  
Automatic Upgrades  
Continuous Improvement

**Open**



Any Device  
API First  
Data Portability

**Easy**



Subscription Model  
Real-time Customizations  
AppExchange

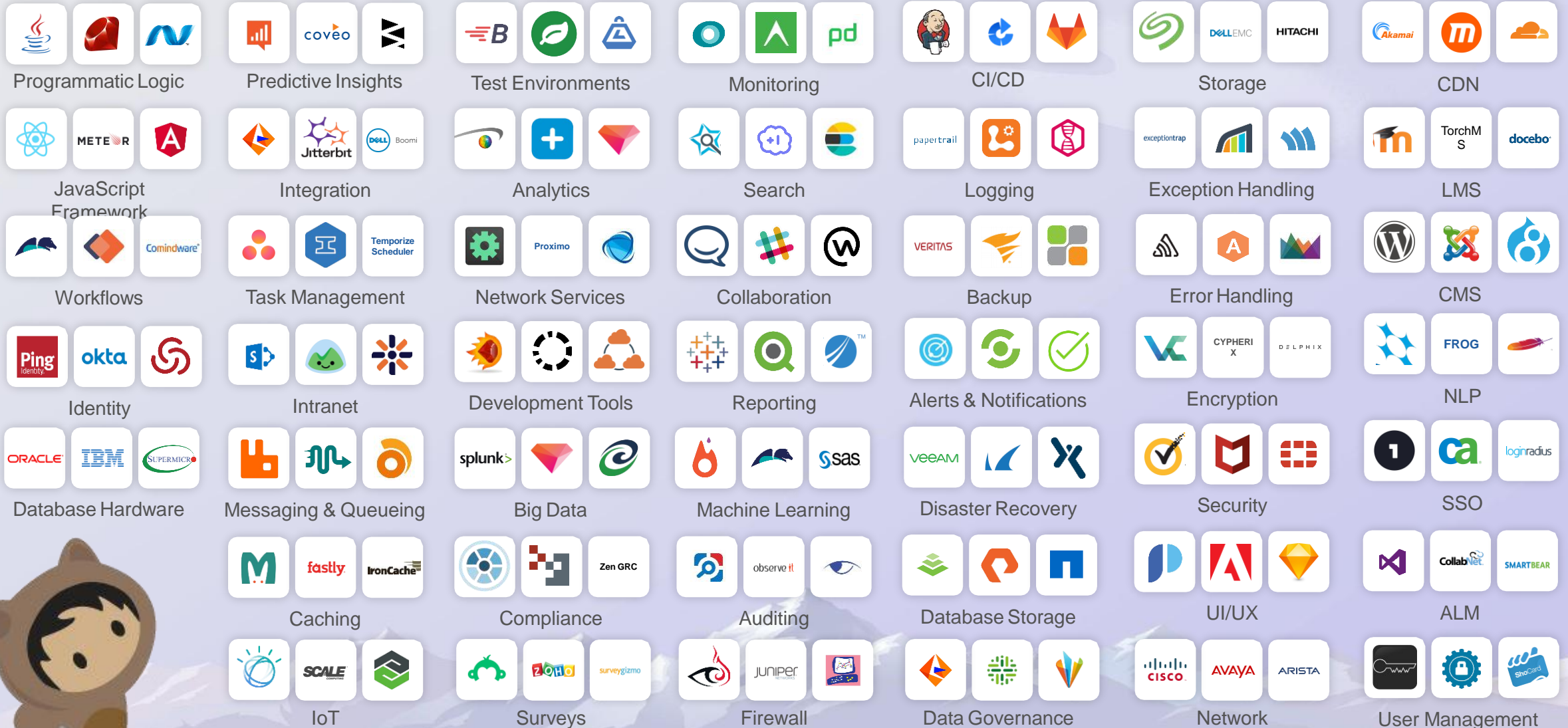
**Trusted**



Secure  
Transparent  
Performance at Scale

# What would it take to recreate Salesforce Platform?

salesforce





# 6,700 Ways to Solve Your Business Challenges



## Apps

Ready-to-install, pre-built partner applications

## Lightning Data

Pre-integrated, scalable data solutions with real-time enrichment

## Components

Building blocks to create apps and custom pages with clicks, not code

## Flows

Connect with and perform actions on third-party systems

## Bolts

Pre-built templates for industry solutions and Communities

## Consultants

Proven experts to tackle integration or implementation



Judy Tang,  
OpenTable

# Trailhead

Learn on-demand at your own pace for free

## Trailhead Platform

Free, gamified learning platform that empowers anyone to skill up for the future

## Trailhead GO

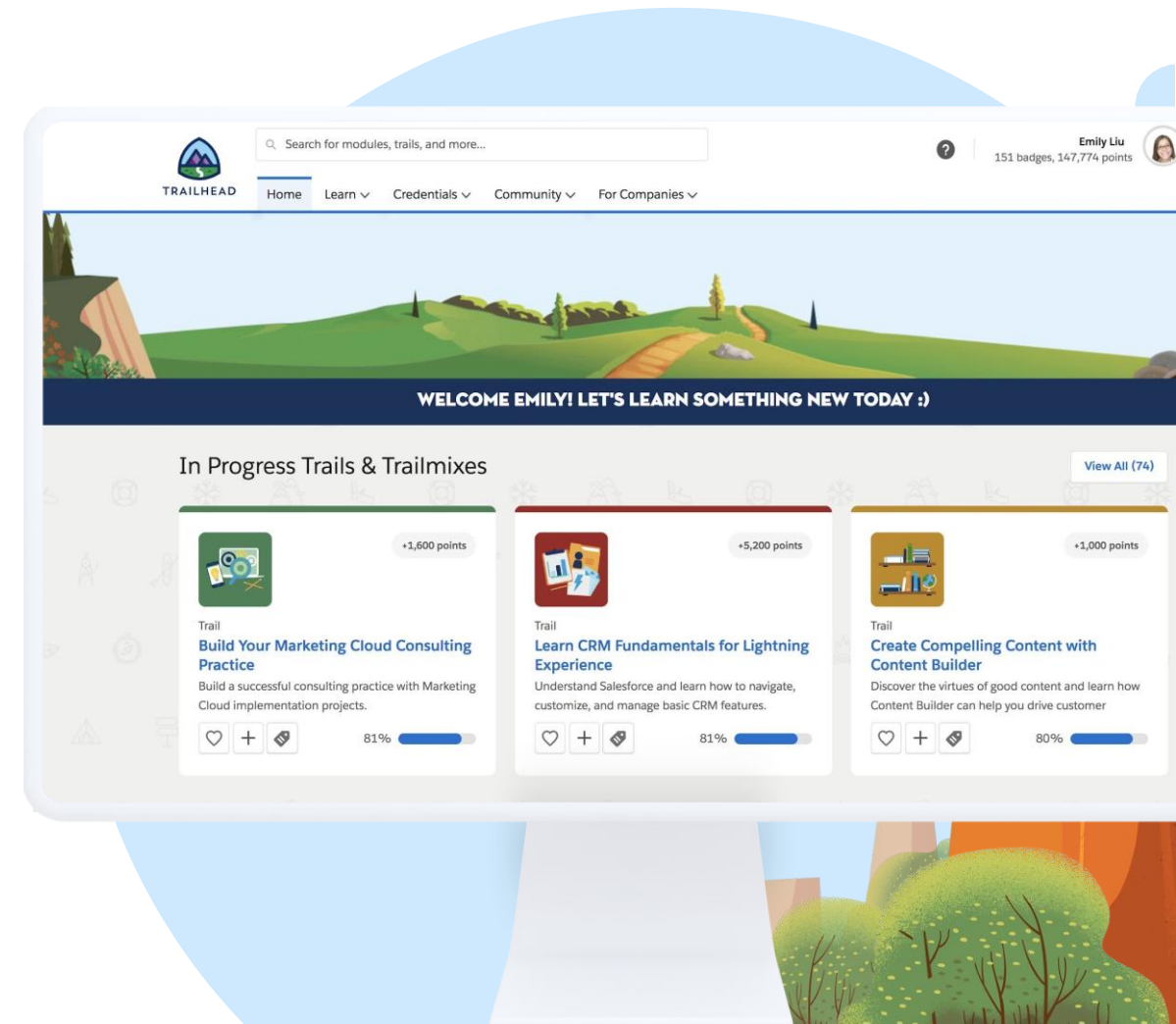
Learn marketable skills from anywhere on the Trailhead GO mobile app

## Trailhead LIVE

Reinvented classroom experience with live-streamed expert-led classes on today's most in-demand skills

[Trailhead Link](#)

salesforce



# Our Proven Methodology



The scoping of your Project is composed of 3 Stages..

Discovery

Solutioning

Delivery

Which deliver 3 results:



**VISION**

What will the solution look like?



**VALUE**

What are the benefits and ROI?



**PROJECT PLAN**

How do you achieve the vision?



# The Stages of Scoping



## Discovery

- Company Strategy & Objectives
- Project Timeline
- Stakeholders Interviews
- KPI's / Business Metrics



## Solutioning

- Value Proposition Mapping
- Use Case Construction
- Dry Run Validation
- BVS Elaboration



## Delivery

- Demo / Proof of Concept
- ROI Showcase
- Salesforce Proposal
- Project Kick Off

# Our Mutual Commitment

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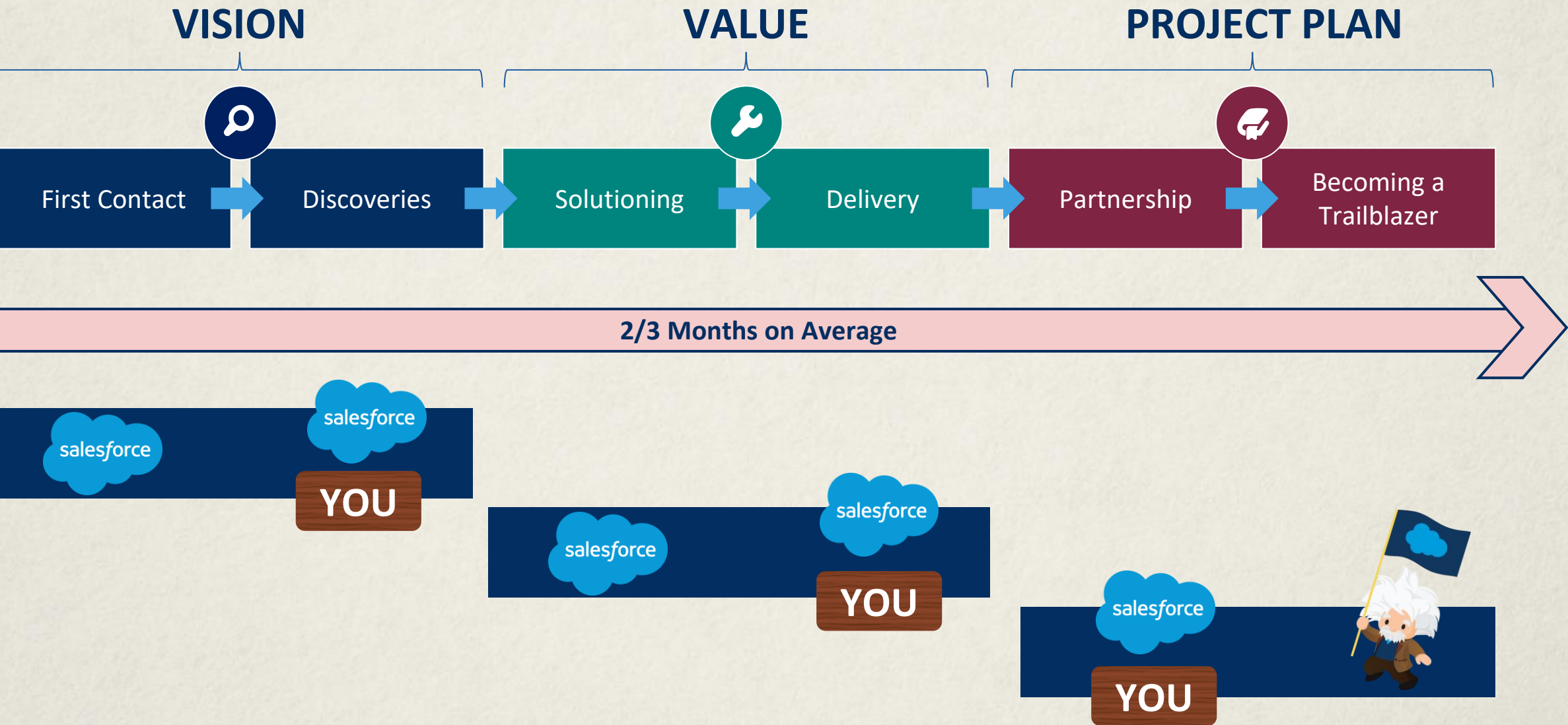
salesforce

- Time, Knowledge, Expertise dedicated to you
- SEs, Products Specialists, Strategic Advisory BVS
- Consulting Approach / Value Based Process Selling
- Real Use Cases Leveraging
- Collaboration and Transparency
- Respect of the Time Frames agreed together
- Confidentiality of our discussions and deliverables

YOU

- Real Commitment about the Process
- KDM Involvement
- Availability of the Project Stakeholders
- Communication of the Project Key Metrics
- Collaboration and Transparency
- Respect of the Time Frames agreed together
- Confidentiality of our discussions and deliverables

# Our Proven Methodology

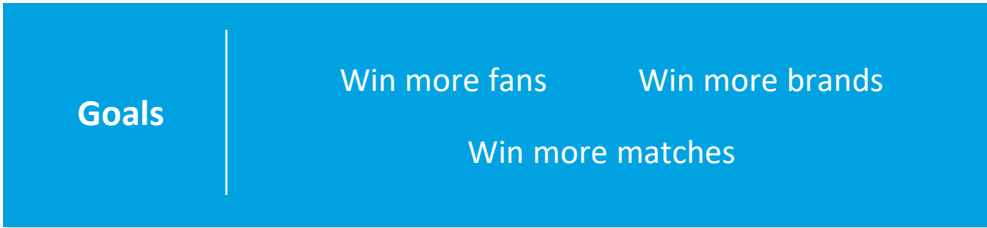
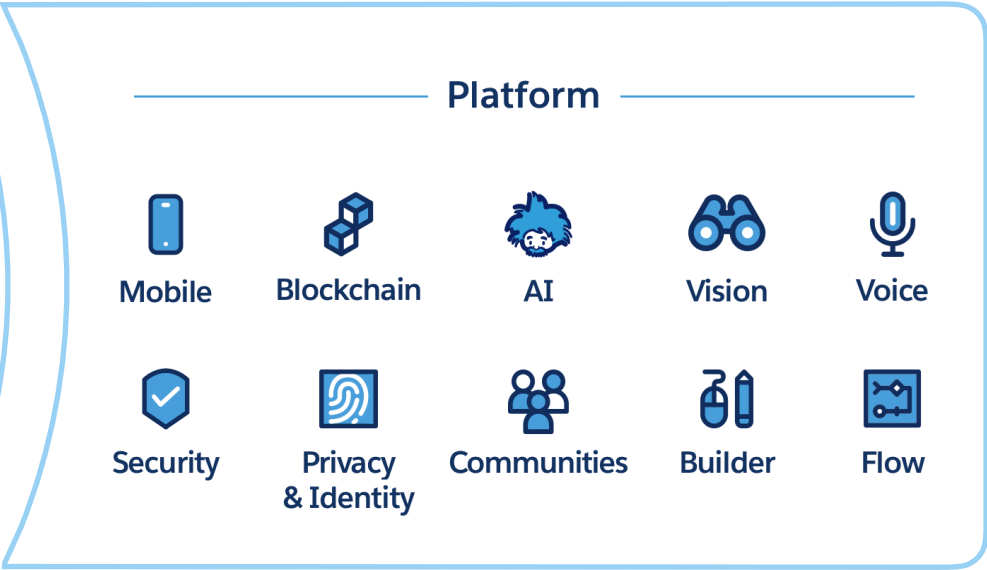




# Examples of customer success stories



# Salesforce Customer 360 for Sport







# Example customer stories





**FC INTERNAZIONALE MILANO**  
OUR FANS AT THE HEART



# FC Internazionale Milan



## 110 YEARS

Of history and heritage as  
one of Europe's  
"Superclubs"



346M  
Fans



170M  
Fans in Asia



110K  
Members



## TOP 10

Most supported Clubs  
worldwide

### HIGHEST

Matchday attendance  
in Italy

### MOST SUCCESSFUL

Youth Academy  
in Italy

### INTER CAMPUS

Over 10000 children  
in 29 countries



3

UEFA  
Champions League



18

SERIE A  
Championships



3

UEFA  
Cup



7

ITALIAN  
Cup



1

FIFA CLUB  
World Cup



2

INTERCONTINENTAL  
Cup



6

ITALIAN  
Super cup



# The Challenges & Goals



## Starting situation

- Multiple, disparate databases
- Mass marketing communications
- Multiple customer service systems
- Disconnected stadium & digital experiences
- Disconnect between sponsors and fans

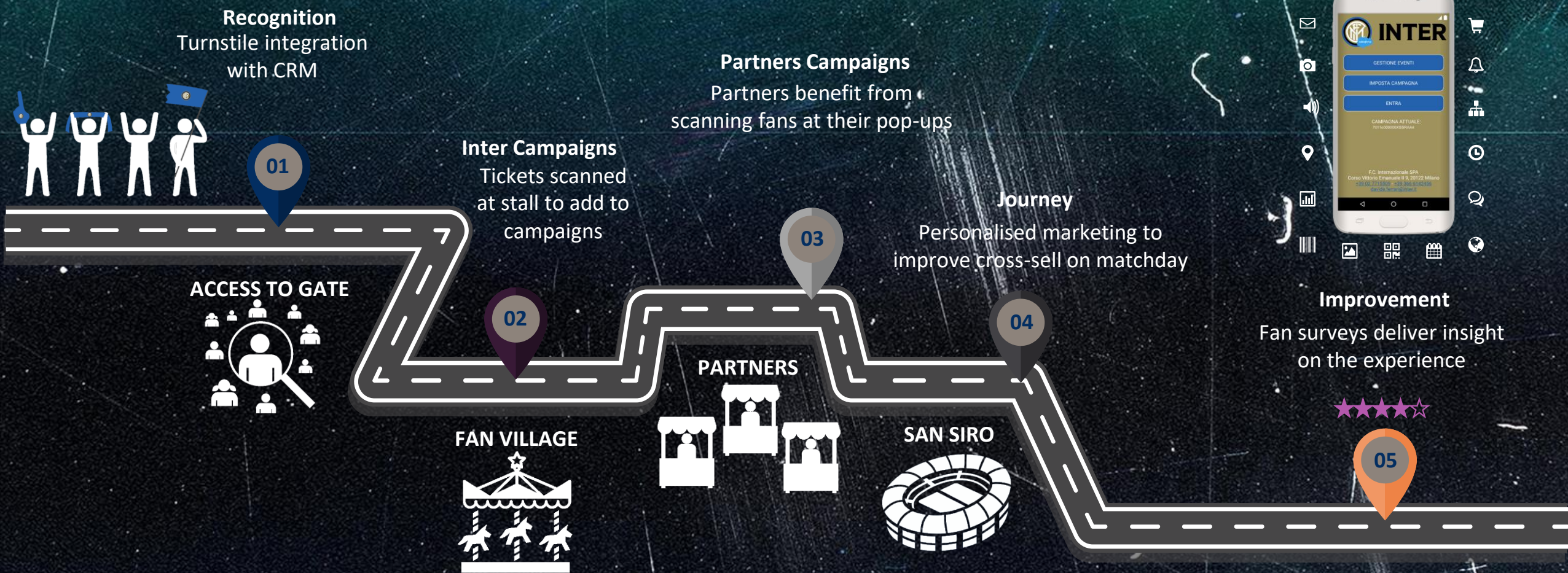
## Project goals

- Single view of the fan
- Seamless journeys for each fan
- Single platform for contact centre
- Real-time integration between turnstiles & CRM
- Online platform for sponsors to collaborate directly with club





# Personalised stadium experience with Sponsors







# Inter Fan Membership

## Project Goals

Deliver more value to local fans

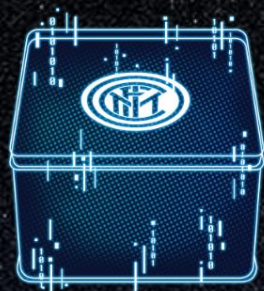
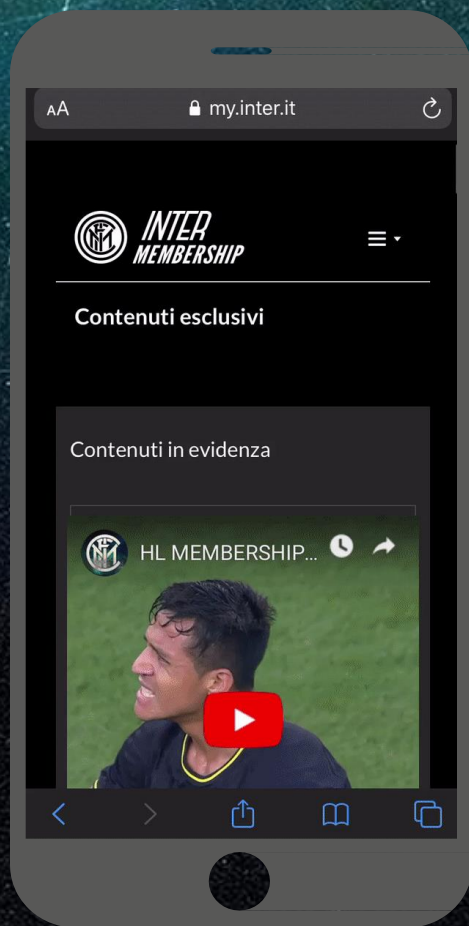
Reach & identify more fans in Italy and Internationally

Get closer to the fans to increase engagement & provide more value for Sponsors

## Value Proposition to Fans

Fan portal with exclusive content

Special access to tickets & merchandise



Blue - Digital Only



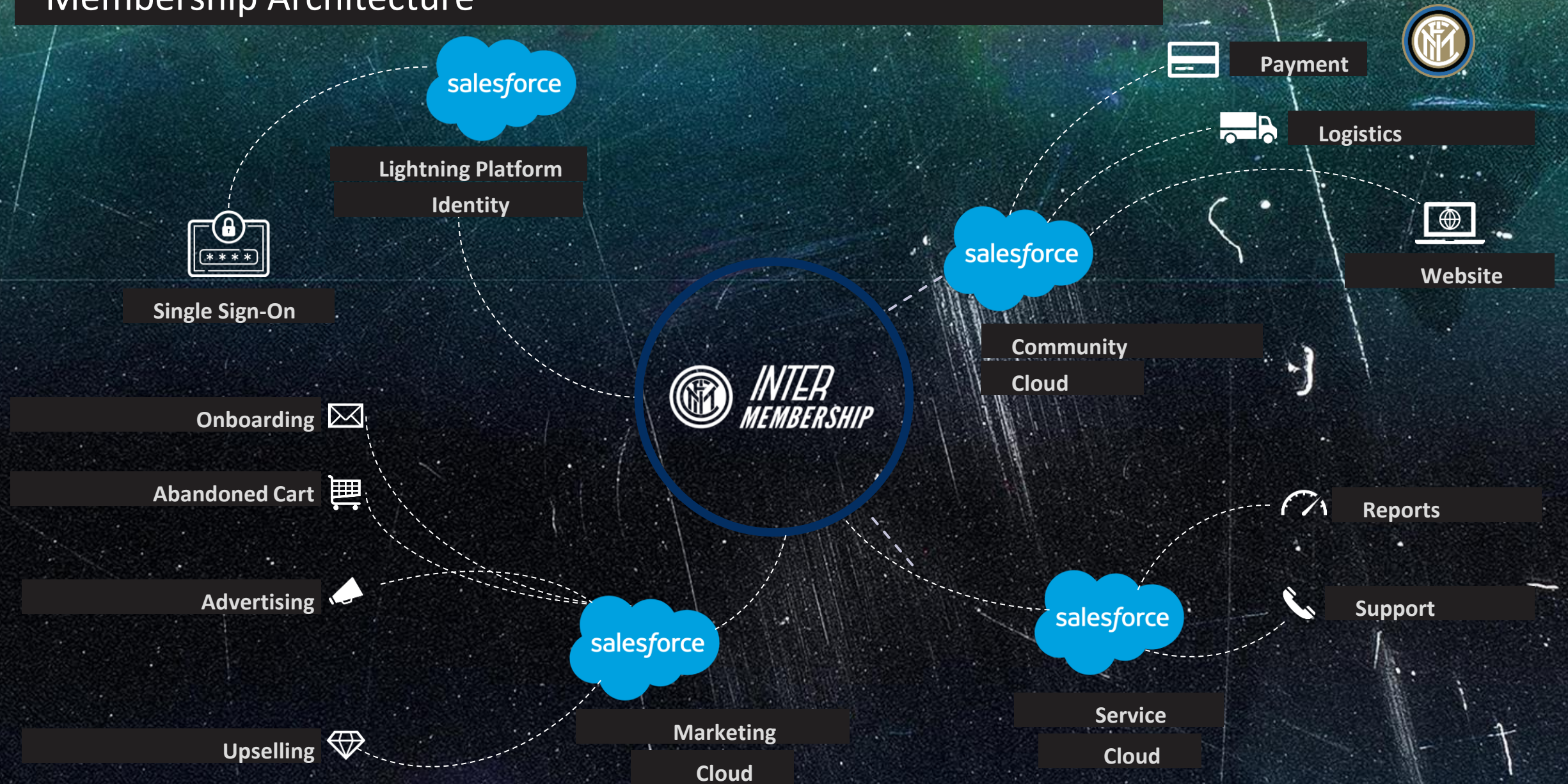
Black - Full Membership



Yellow - Young Fans



# Membership Architecture





# Inter Fan Membership



**INTER** | **linkem**  
CONNECTING PARTNER

**RESTA CONNESSO DA CASA  
ALLA TUA SQUADRA DEL CUORE**

SCEGLI L'ESCLUSIVO **INTER-NET PACK**:  
Connessione internet, Black Pack Membership, Contenuti esclusivi Inter

**19,90€** / MESE PER I PRIMI 6 MESI

SCOPRI DI PIÙ

Fan acquisition & engagement:

40% International members

50+% Open rates through direct engagement

70+% Members accessing matchday preview

40+% Members playing the games

3 Product bundles sponsored by Partners  
New members

8% through Partner bundles



Linkem (Telecom) sponsored offer:  
“Stay connected to your favourite team from home”  
€19.90 euros (down from €30) for first 6 months



## Example - Fan Engagement during COVID-19



*“Social Wall” to support the team*

*#TogetherAsATeam*

Campaign integrated with Salesforce CRM

Reaches identified & unidentified fans >>> option to ask for registration before photo is posted





Sales



Marketing



Analytics

# Partnerships & Corporate Hospitality



**Single view of the B2B customer**  
Multi-year dataset - critical for sales & retention



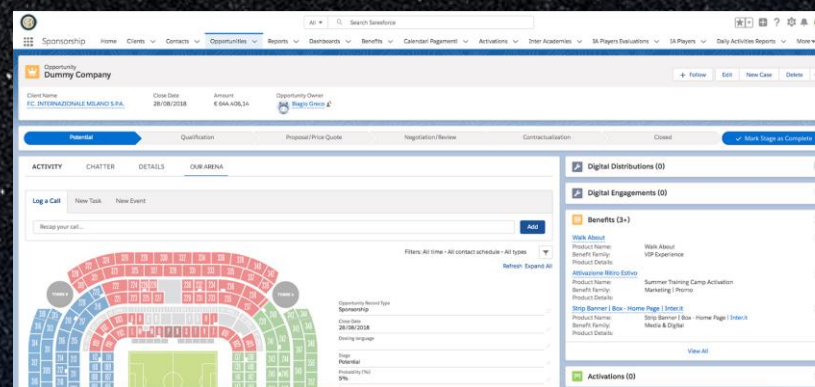
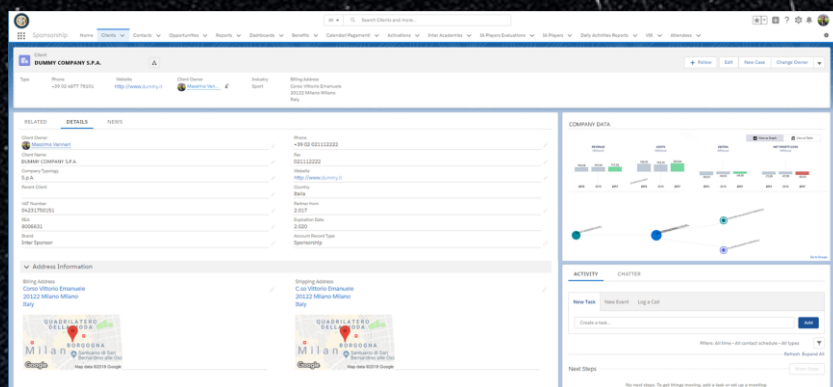
**Making the most of our Sales team's time**  
Avoid mass emails - focus on the right contact



**Improve our Sales Team with a 4.0 approach**  
Leveraging tech to take sales team to next level



**Digital at the centre of Corporate Hospitality Sales**  
See availability for all hospitality seats in the CRM







Sales



Marketing



Service



Analytics

# Partnerships & Corporate Hospitality







Sales



Community

# B2B Hub - Enjoy the Sponsorship!



**Activate the Partnership: use my Hub!**  
Community-based one-stop shop for partners

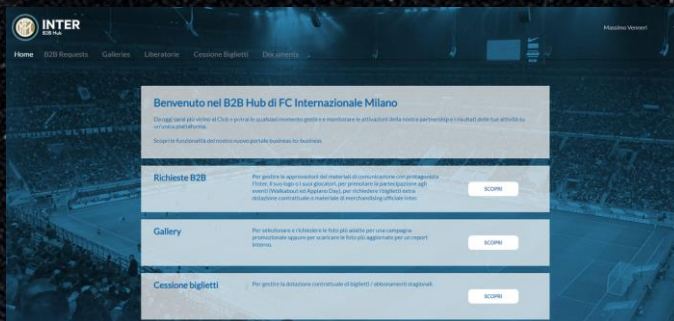


**Here's your assets: spend them consciously**  
Partners access all marketing assets from the Hub

**Get the most from our Partnership**  
Finance can track usage to optimise contracts



**What is my ROI?**  
Data-driven approach - all shared to Partners in the Hub





# Our Growth, Our Goals

**CAGR** GLOBAL REVENUES  
LAST 3 SEASONS

**48%**

**CAGR** SPONSORSHIPS REVENUES  
LAST 3 SEASONS

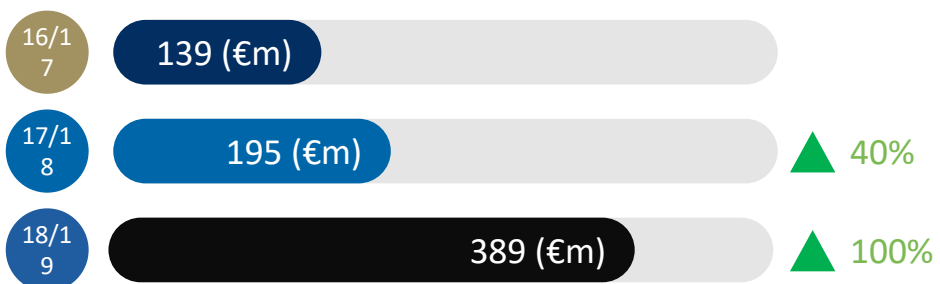
**39%**

**CAGR** HOSPITALITY REVENUES  
LAST 3 SEASONS

**7%**

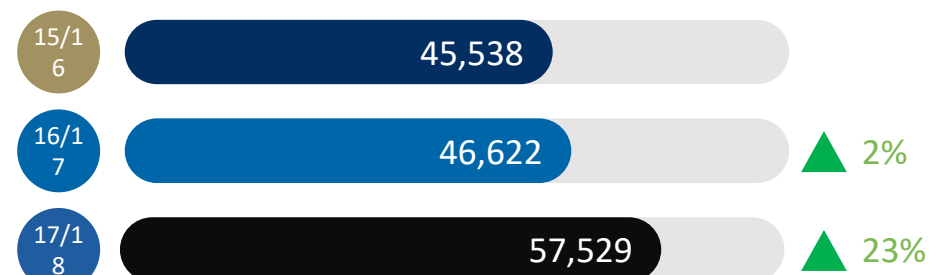


## BRAND VALUE



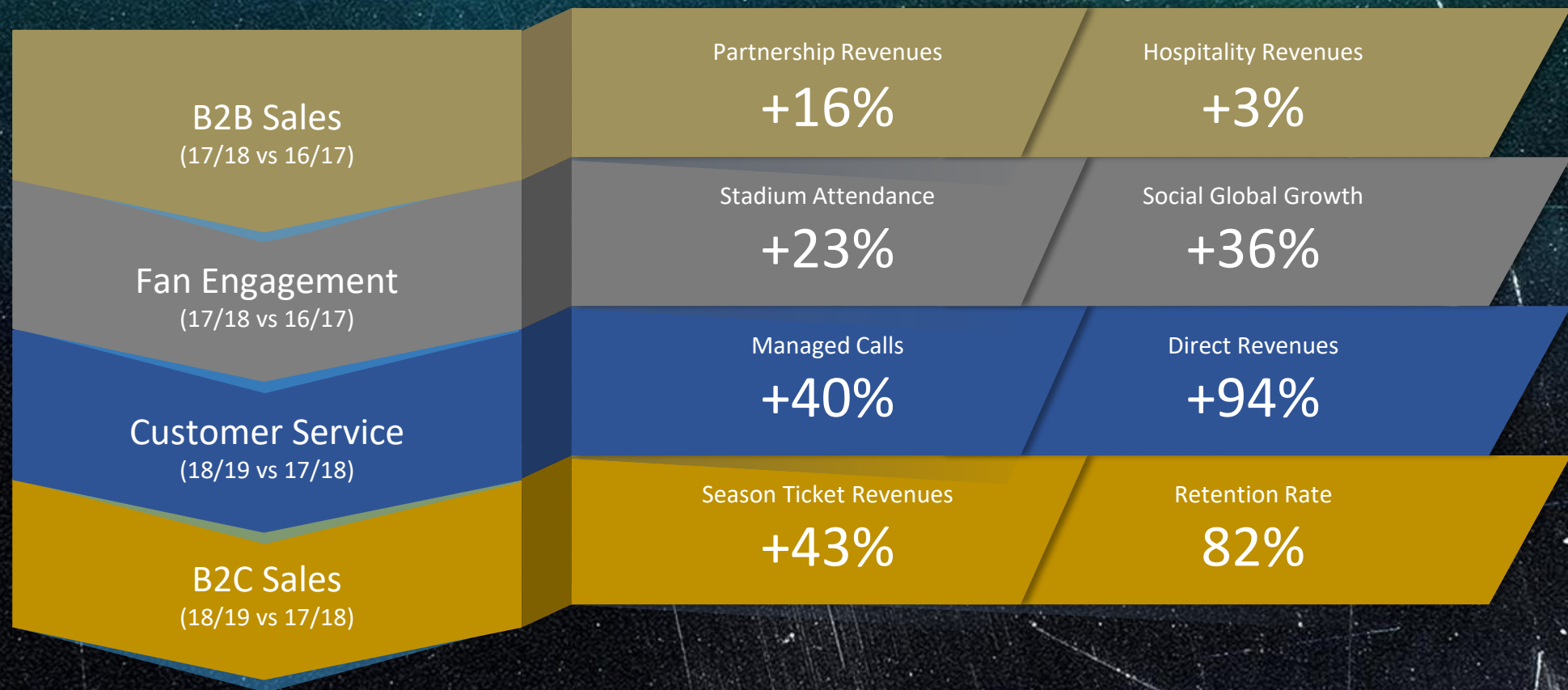
Source: Brand Report, 2018

## STADIUM ATTENDANCE





# Key results so far



# Example customer stories









# OLYMPIQUE LYONNAIS – UNITED TO ROAR!



FOUNDED IN 1950 AND UNDER  
JEAN-MICHEL AULAS LEADERSHIP  
SINCE 1987



MORE THAN  
6 MILLIONS  
FANS



OWNER AND OPERATOR OF OUR  
OWN STADIUM SINCE JAN 2016



THE BEST TRACK RECORD IN FRENCH  
FOOTBALL SINCE 2000 & THE UNDISPUTED  
LEADER IN WOMEN FOOTBALL



ONE OF THE MOST PROLIFIC  
ACADEMY IN EUROPE



# HOW DID WE GET THERE ? THE 2015 PICTURE

4 FTEs in marketing, no digital department and 1,5 FTE in customer service

In-house developed CRM with limited fan knowledge (~20% of fans attending a game where identified) and not used in B2B sales

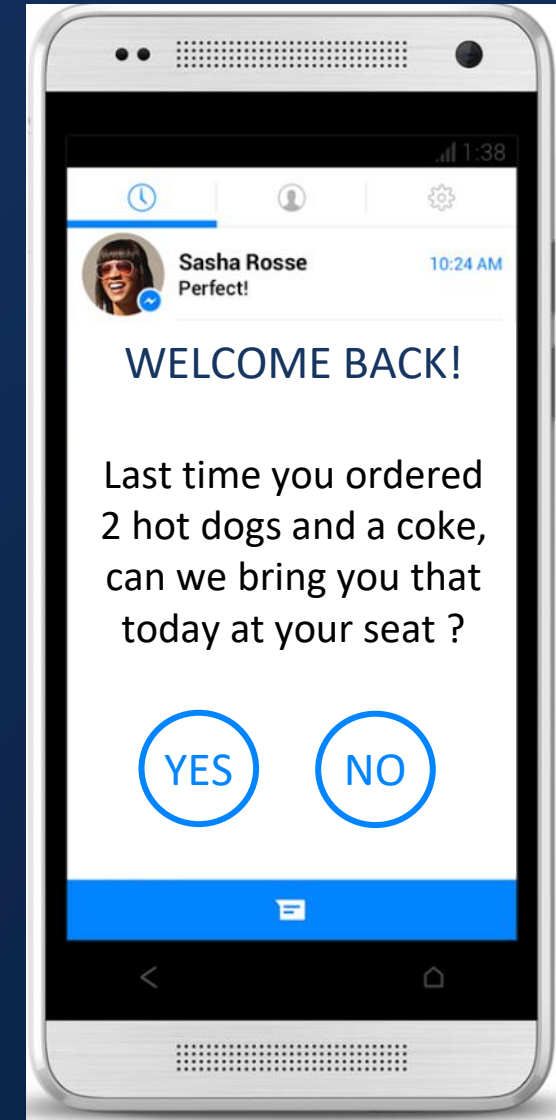
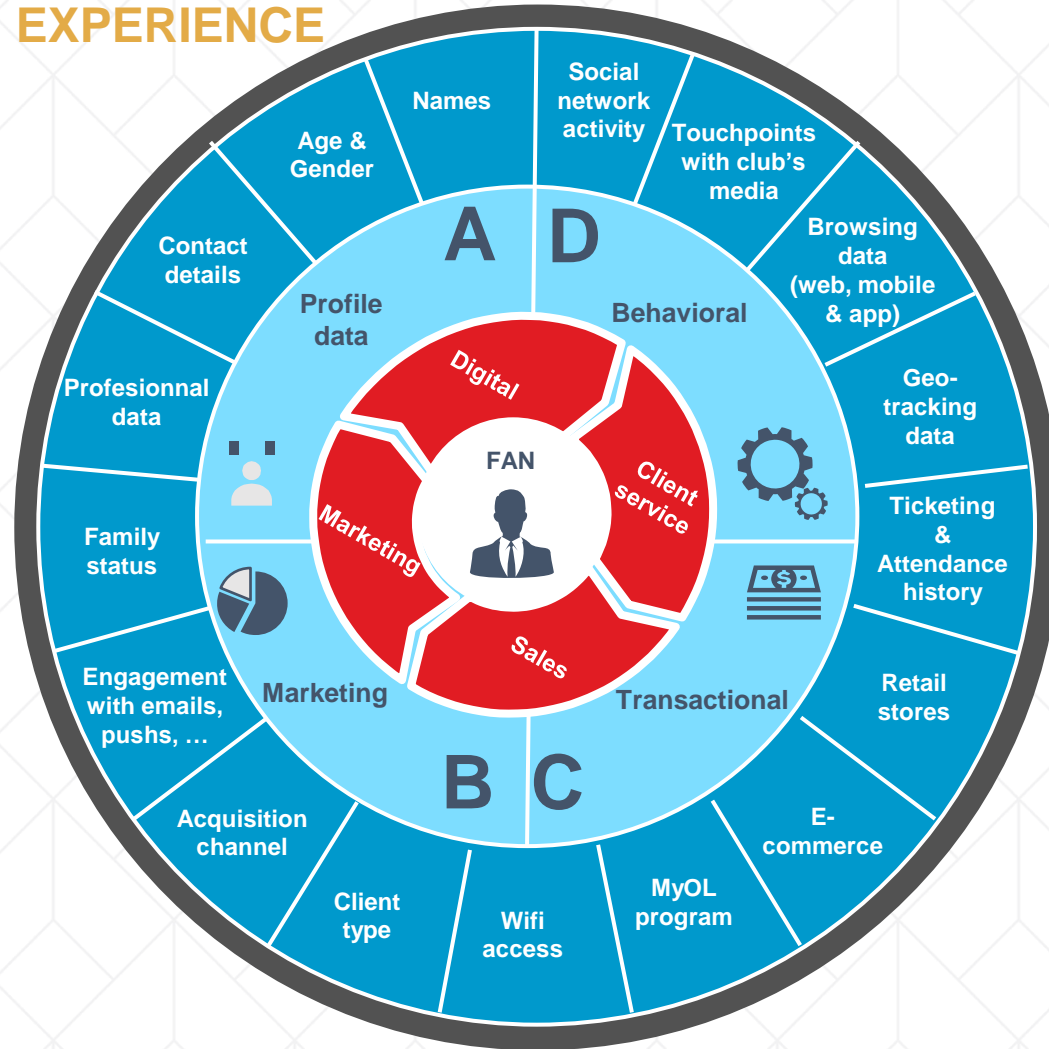
No single view of our fans – Most data was either not captured (B2B sales funnel, customer care touchpoints, interactions with our marketing, ...) or in silos (e.g., merchandizing sales, browsing data, stadium access control, ...)

99% of marketing budget was spent in mass-marketing levers (mostly club media, press, OOH and emailing)

A municipal stadium with 5 F&B POS and no connectivity

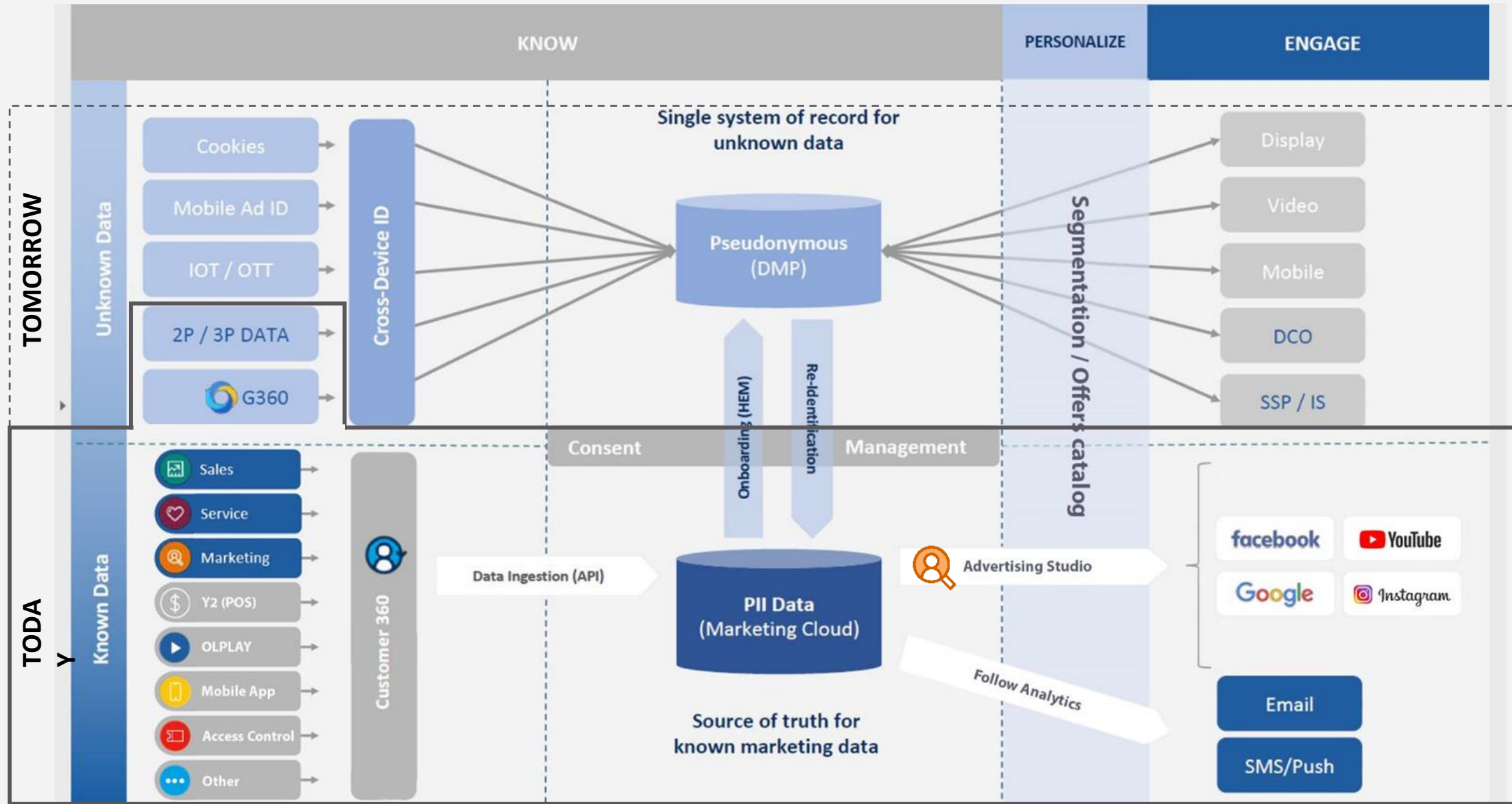
# THE VISION

CAPTURE AND LEVERAGE FANS DATA INTO  
PERSONALIZED OFFERS TO ENHANCE THE FAN  
EXPERIENCE





# IMPLEMENTING THIS VISION REQUIRED A MASSIVE TRANSFORMATION OF OUR IT INFRASTRUCTURE



# MY OL – A NEXT-GEN PAYMENT CARD & LOYALTY PROGRAM

## Fans using MYOL benefit with:

- Priority POS & faster payments on matchdays
- Extra loyalty points on matchdays
- With app, ability to order food & drink to their seat
- Exchange points against “money can’t buy” items

## Club benefits from MYOL program by:

- Faster & more relevant customer service – all data in Salesforce
- More data = more knowledge of fans & more personalised marketing
- Unified view across revenue streams

Integration:  
Transaction data

Used for:  
Dynamic segmentation  
Customer service

Loaded on card:  
Season ticket  
Cash



Active for:  
Food & drink  
Mega-store  
Small stores  
Ticket gates



# FANS-FIRST – OFFER THE BEST OF OL TO EACH FAN



**Recognize and praise preferences heterogeneity of our fans**



Transform our marketing from « product-based » to « fan-based »

(i.e., adapt our marketing message and offering to where our fan is in his lifecycle with us (onboarding, repeat purchase, win back, etc.)



**A trial & error approach**



Collectively brainstorm on new levers articulated around the fan lifecycle, run proof of concept, analyze the results factually and industrialize the ROI-positive levers



**Gain in efficiency**



Less volume but more relevant personalised interactions with our fans

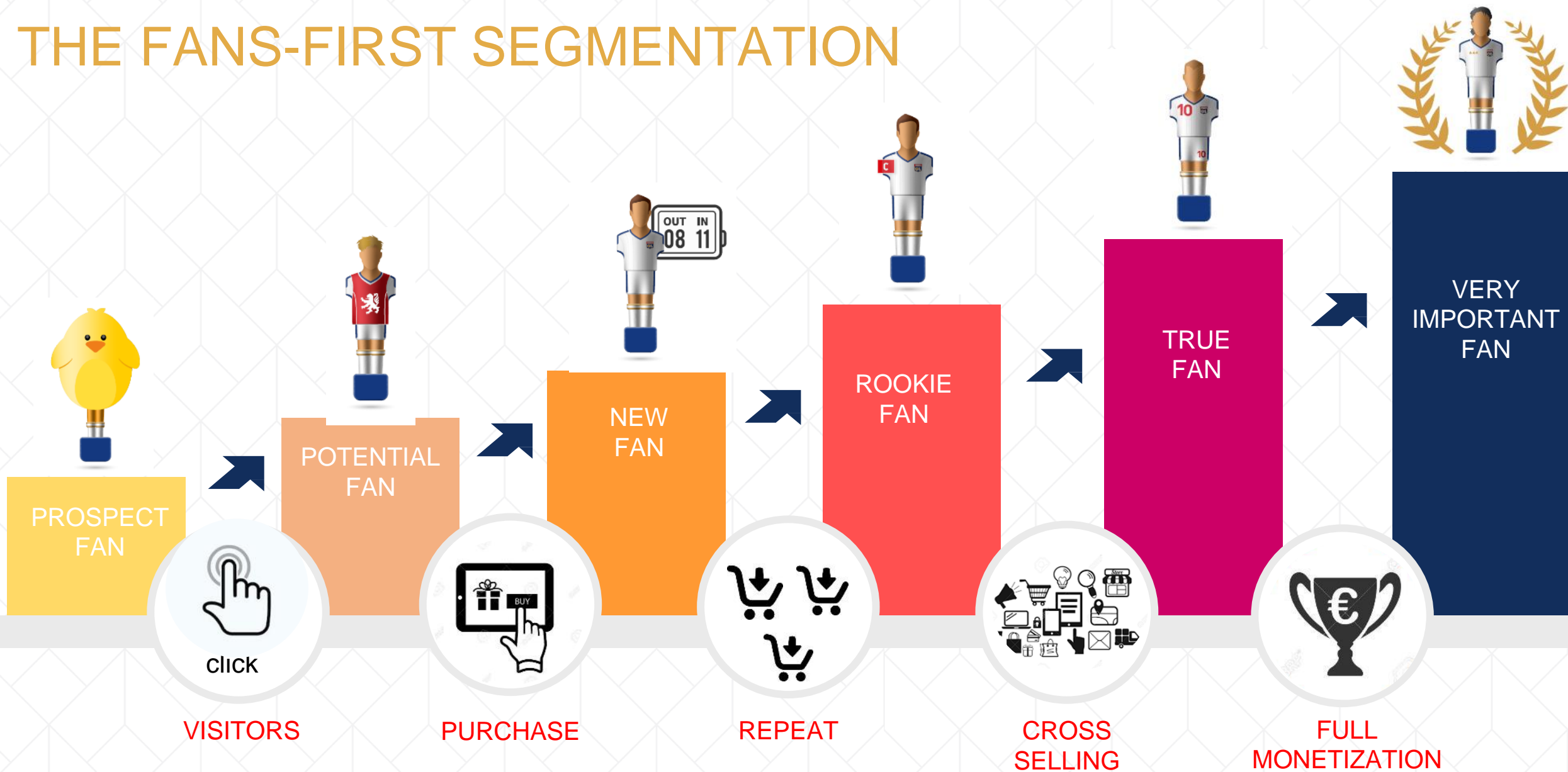


**Reach the full potential of our digital infrastructure**



Before investing again to get to the next stage

# THE FANS-FIRST SEGMENTATION





# FANS FIRST – THREE EXAMPLES

## 1 **RISK ANALYTICS**

Leverage fan data to assess season ticket holders risk of churning next season and adapt our touchpoints and sales strategy accordingly

## 2 **SEGMENTED OFFERS**

Assess where the fan is in his lifecycle with us and adapt our offering & content accordingly.

## 3 **TARGETED ACTIVATION FOR OUR SPONSORS**

Enrich fan view with third party data & customer surveys to identify the most valuable prospects and drive more traffic



# RESULTS

# SOME RESULTS

## B2C FAN ENGAGEMENT

900k+

CONTACTS IN OUR  
B2C DATABASE

80%

WITH AT LEAST  
ONE ACTIVITY  
OVER THE LAST 24  
MONTHS

40k+

MyOL ACTIVE  
CARDS IN  
CIRCULATION

180k+

NEW CONTACTS  
EACH SEASON

## B2B CORPORATE HOSPITALITY

13k+

COMPANIES IN  
OUR DATABASE

33%

OF OUR CURRENT  
CLIENTS HAVE AN  
ANNUAL REVENUE  
BELOW €1M

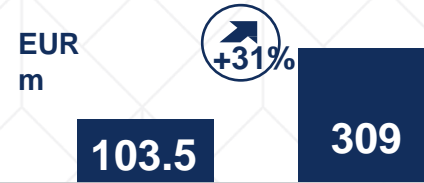
-50%

CHURN OF OUR GP  
SEASON TICKET  
HOLDERS VS. 2Y  
AGO



# WHERE DO WE STAND

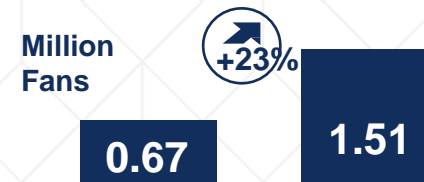
TOTAL



TICKETING REVENUES



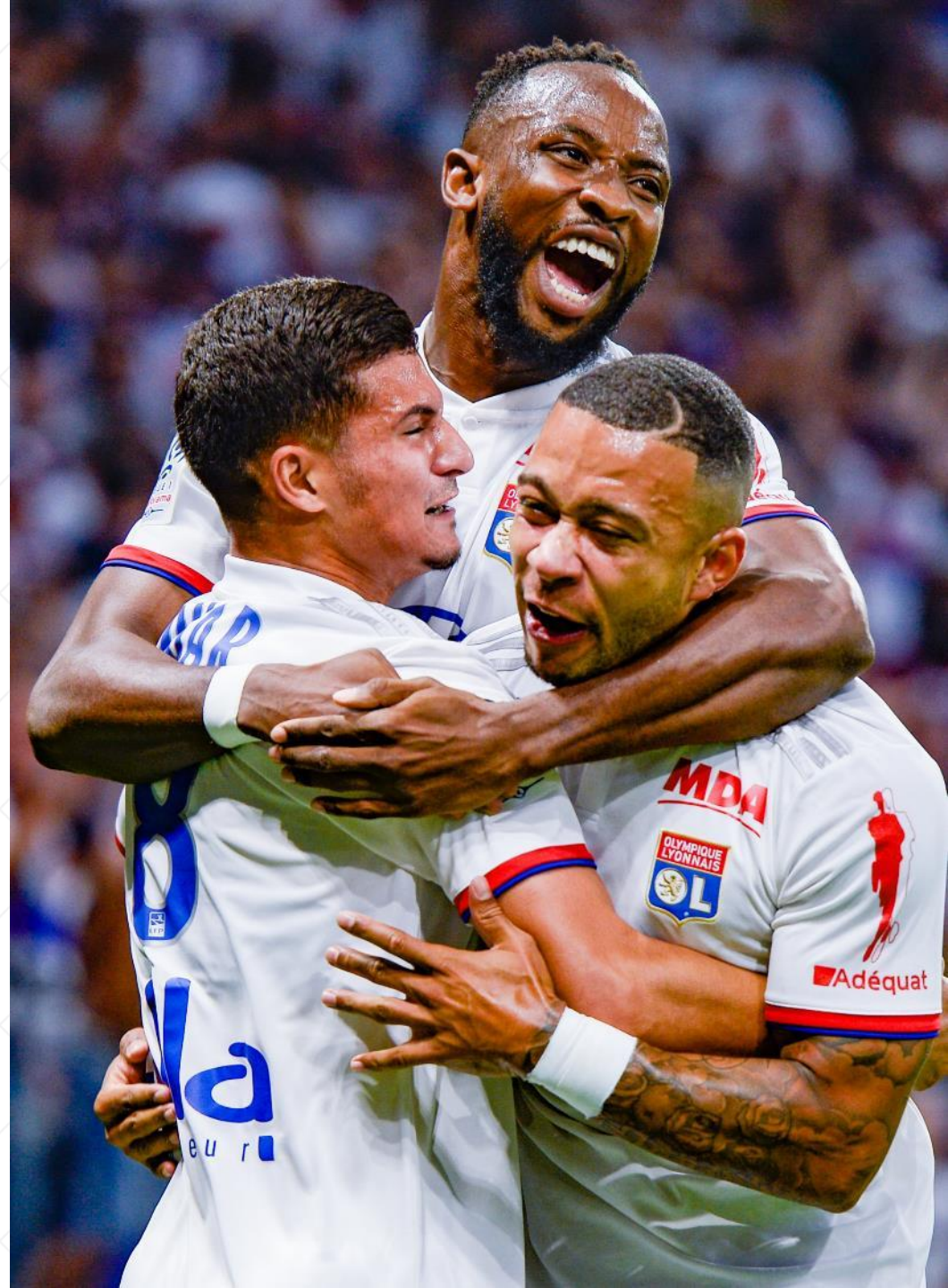
TOTAL



NUMBER OF FANS



2014/2015 2018/2019







THANK YOU!



# Example customer stories







salesforce



FC Schalke 04





# An introduction to FC Schalke 04

**€265m**

2016 Revenue  
(€90m from Marketing)

**150+k**

Europe's 4th largest club by membership

**~10m**

Supporters worldwide



**99%**

Stadium capacity utilisation

**>7m**

Social media followers

**~2.6m**

Stadium visitors

# Several challenges needed to be overcome to take FC Schalke 04 to an even higher level



## Aim:

*To be one of Europe's  
Top 10 football club  
brands*



Switch from mass communication to highly personalised fan engagement

Digitise the club's marketing and service operations

Extend their reach beyond their members, both nationally and internationally

Deliver more ROI to their partners

*"My belief was that Marketing should, as much as possible, perform independently of our sporting success to ensure the economic stability of the club, even in difficult times"*

Alexander Jobst, Chief Marketing Officer



# FC Schalke 04 chose Salesforce as the platform to support their goals



*“Thanks to Salesforce, the digital tools and channels are available to communicate directly with fans, capture their mood and draw conclusions”*

*“Our fans are incredibly loyal but, if things are not going so well, we feel that immediately. Digitalisation enables us to respond”*

Personalised email, mobile & push messaging, and landing pages



Social listening, engagement & publishing



Portals for fans and fan groups



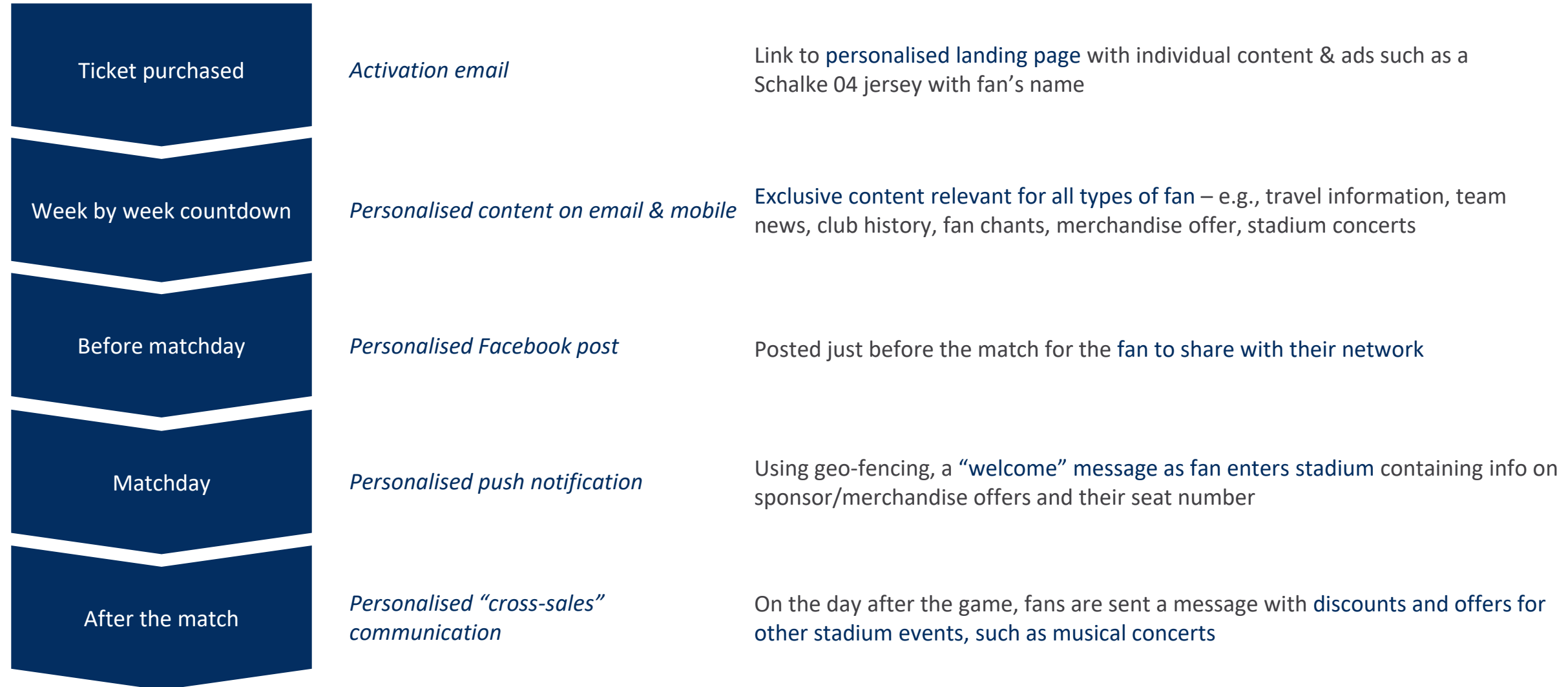
Omni-channel service to fans



Partnership sales



# Use case example #1: Omni-channel 1-to-1 fan journey





# Use case example #2: Increasing ROI to sponsors on matchday



*Push notification: "Welcome to Stadium"*



*Fan collects loyalty points and requests membership*



*Mobile landing page with more info*



*Fan receives lottery ticket from sponsor*



*Winner announced in the stadium*



# Salesforce is delivering success for FC Schalke 04 in its first full season



**15%**

Growth every month  
vs last year of  
ticketing &  
merchandise sales

**>30%**

Merchandise revenue  
driven by  
recommendation engine  
– up from 0%

**13%**

Fans returning to  
abandoned baskets to  
complete purchase – up  
from 0%

**1.000**

Leads generated each  
matchday for club &  
partners\*

**8**

Joint campaigns run with  
partners – up from 0

## *Salesforce helps FC Schalke 04 achieve their aim of consistent marketing-led revenue, independent of sporting success*

Effective joint campaigns with brands to deliver even more value to strategic sponsors

Best-in-class, personalised fan experience within the stadium and far beyond with 1-to-1 omni-channel fan journeys

Intelligent data analysis to listen to fan groups on social media, detect their mood and tailor response

Omni-channel personalised service to fans via mobile, social, fan portals and in the stadium

Integrated partnership sales to maximise revenue from strategic partnerships

\*With “double opt-in: to ensure GDPR compliance

Source: FC Schalke 04, Leaders Sports Business Presentation, Oct 2017



# Thank You

