

# How the Aging Population is Leveraging Technology to Improve Daily Life

# NEW REVENUE CASE STUDY



CLIENT: **AARP**

## SalesForce drives sales with Virtual Customer Advisory Boards

Salesforce responded to an RFP for a new CRM solution for AARP. As one of four potential providers, the Salesforce was seeking a way to differentiate their offering and improve their chances of winning the business. The goal is to transform AARP's customer experience by leveraging best-in-class digital technology that serves both existing and future members. Salesforce wanted to take proactive steps that AARP's Sr. Management would notice.

### FACILITATOR



**Michael Phelan**  
Principal  
Go-To-Market Pros

- Highly rated Facilitator on Currnt.com
- Successful led VCABs for Accenture and P&G
- Strong experience developing products & services for elderly

### OBJECTIVES

- 1** Engage More Members of Strategic Team of AARP
- 2** Differentiate the Salesforce proposal
- 3** Gain insights to support a 3 year roadmap of relevant solutions

### APPROACH

Salesforce proactively curated a **Virtual Customer Advisory Board** to co-learn with Senior Management of AARP:

- Currnt's technology generated **30+ external expert applicants in 4 days** with relevant experience serving the aging population from industries including tech, membership orgs., healthcare, and finance.
- **Experts engaged in bi-weekly themes** exploring the future of senior online experiences.
- **Key Decision Makers at AARP** met Salesforce and the Facilitator on regular check-in calls to discuss the insights, including the SVP Experience, VP Digital Strategy, and VP Technology Programs
- Currnt platform created a steady flow of **branded content deliverables** – including exec summaries, video podcasts, reports

### IMPACT

- **New relationships** were formed with **AARP's Senior Management**
- Validated the need to **transform AARP's digital customer experience**
- AARP Decision Makers now considering a **3-5 year Salesforce investment**

### TOP 3 OF 20 EXPERTS



**Paul Belle Isle**  
VP, Membership Marketing AAA; Chief Marketing Advisor



**Lori Williams**  
Registered Nurse (RN, CCM) & Training Manager, Healthcare Services, Molina Healthcare



**Maureen McNamara**  
Regional Director at Brightview Senior Living; Board Member, Assisted Living Association

### CONTENT OUTPUTS

- **12 Weeks**
- **6 Bi-Weekly Themes**
- **6 Facilitator-led Summary Reviews with AARP**
- **6 Exec. Summary Reports**
- **3 Podcast Facilitator Videos**
- **Master Presentation of key insights**
- **124 Pages of Transcript**

*"The insights were absolutely needed to get all of our leadership on board. Not only did we love the experience, but it align our strategic goals and gave us the missing data to justify the right decisions."*

**Nkobi George, VP Technology Programs, AARP**



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