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Demystifying AI + Data + CRM: Where to start

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Agenda

- Customer Magic
- Demystifying AI + Data + CRM = Customer Magic
- Where to start
- Resources

Customer Magic

These are Exciting Times!

Today's Business world

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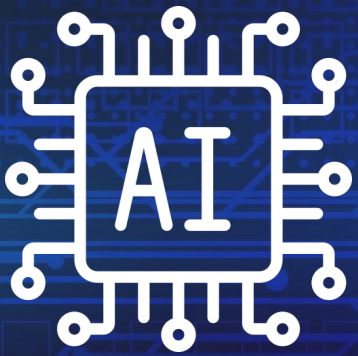
*71% of CMOs Believe They Lack Sufficient Budget to Fully Execute Their Strategy. They are prioritizing Brand, Ops and **Data** in Program Spend*



63% of marketing leaders are planning to invest in generative AI in the next 24 months

Source: Gartner

Customer 360

Source: Salesforce

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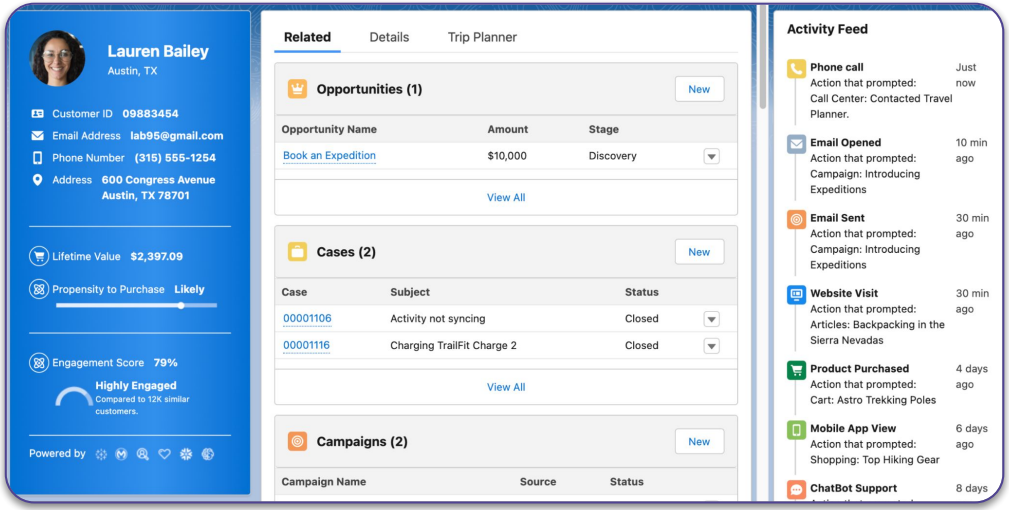
Customer Magic

Help companies act on insights with AI, unify customer data, and automate in real time.



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Demystifying AI + Data + CRM = Customer Magic

Einstein GPT

Data Cloud

CRM Automation

Customer Magic

Artificial Intelligence (AI)

Salesforce Einstein

Predictive AI

It forecasts future events by analyzing historical data trends to assign probability weights to the models

- Einstein Behavior Scoring
- Einstein Lead Scoring
- Einstein Key Accounts Identification
- Einstein Campaign Insights
- Einstein Attribution
- Send Optimization
- Einstein Engagement Scoring
- Einstein Engagement Frequency
- Send Optimization
- Copy Insights
- Content Selection

Generative AI

It creates new data, which might be in the form of text and images.

- Einstein GPT: Marketing GPT, Sales GPT, Service GPT
- Einstein 1
- Einstein Copilot

Data

Activate all your customer data across Salesforce applications, empowering teams to engage customers, at every touchpoint, with relevant insights and contextual data.

Data Cloud

1 CONNECT

Ingest customer data from any source and data sources

2 HARMONIZE

Clean, dedup, and unify data to get a single view of the customer

3 ENGAGE

Quickly access customer's history and trends and activate across the entire customer 360

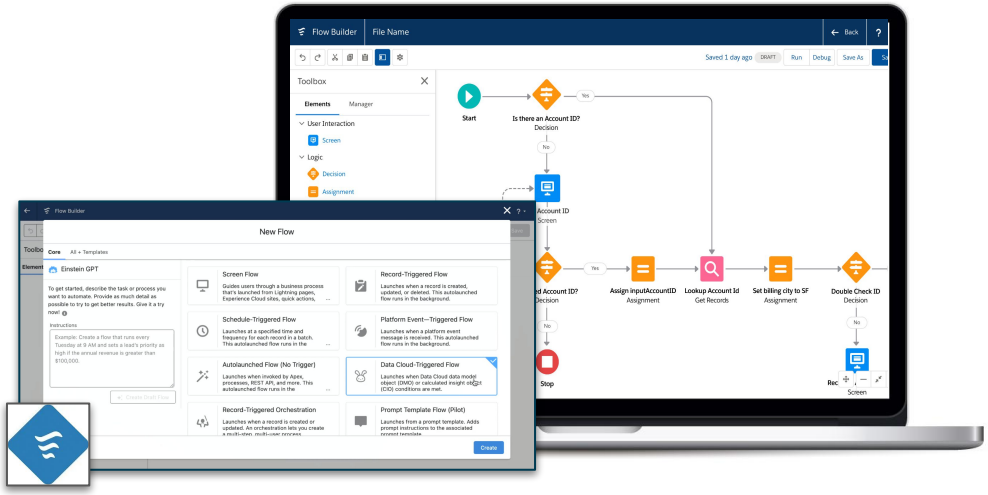
4 EXPERIENCE

Get deep insights and IA fuel predictions on your customers to create remarkable experiences

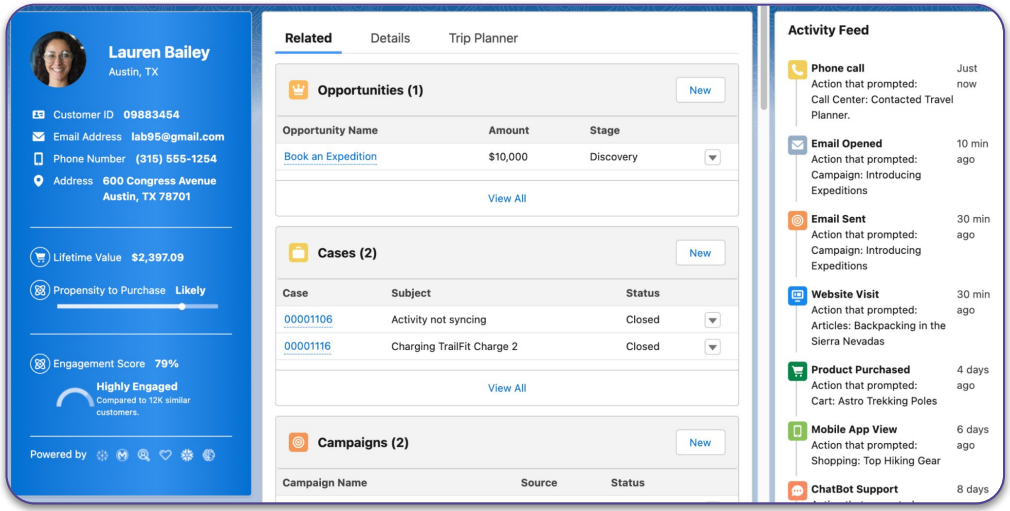
CRM

Leverage 1st party data + Unified Data + AI trust layer and maximize customer experience with the power of CRM Automation

CRM Automation



Customer Magic



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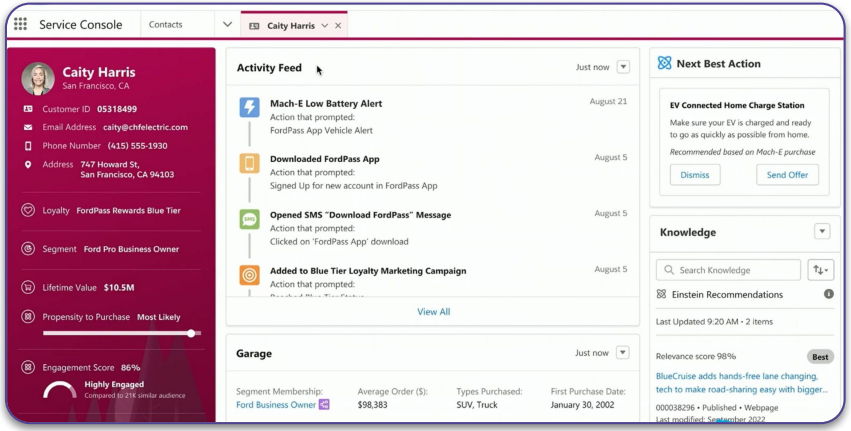
Platform

Ford

Strives to ensure 100% connectivity to their customers. Staying focus on continuing a loop of adding value to their end users and their experiences. Data is key: lifestyle, vehicle data is key. Ford's magic is the democratization of transportation for both business and personal use.

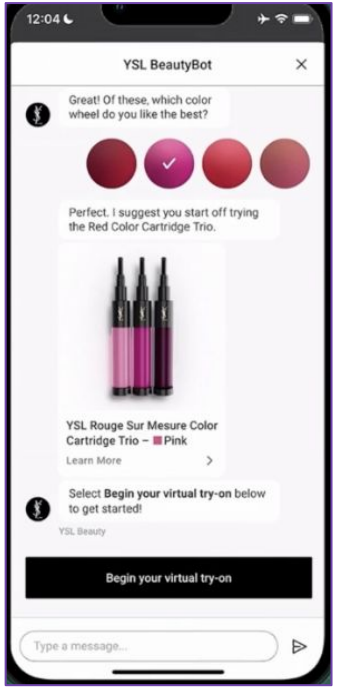
- Onboarding messages from Ford about the new vehicle
- Remarkable experience when scheduling her vehicle service appointments
- Recommendation of next best offers

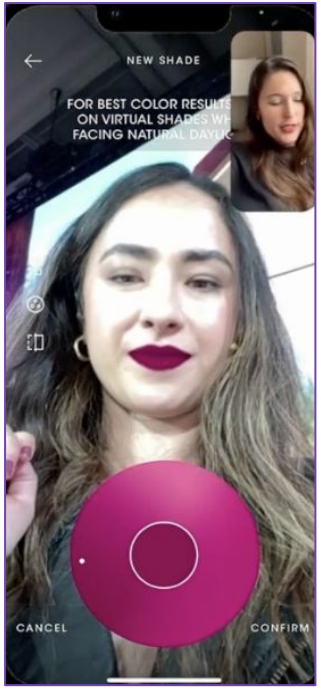


L'Oréal

The purpose of L'Oréal is to create the beauty that moves the world. New area of creation: Product and services

- Beauty tech allows to create the ultimate personalized beauty experience
- Inclusive beauty at global scale
- Leverage century long of data: hair science, skin science, makeup consumer routines

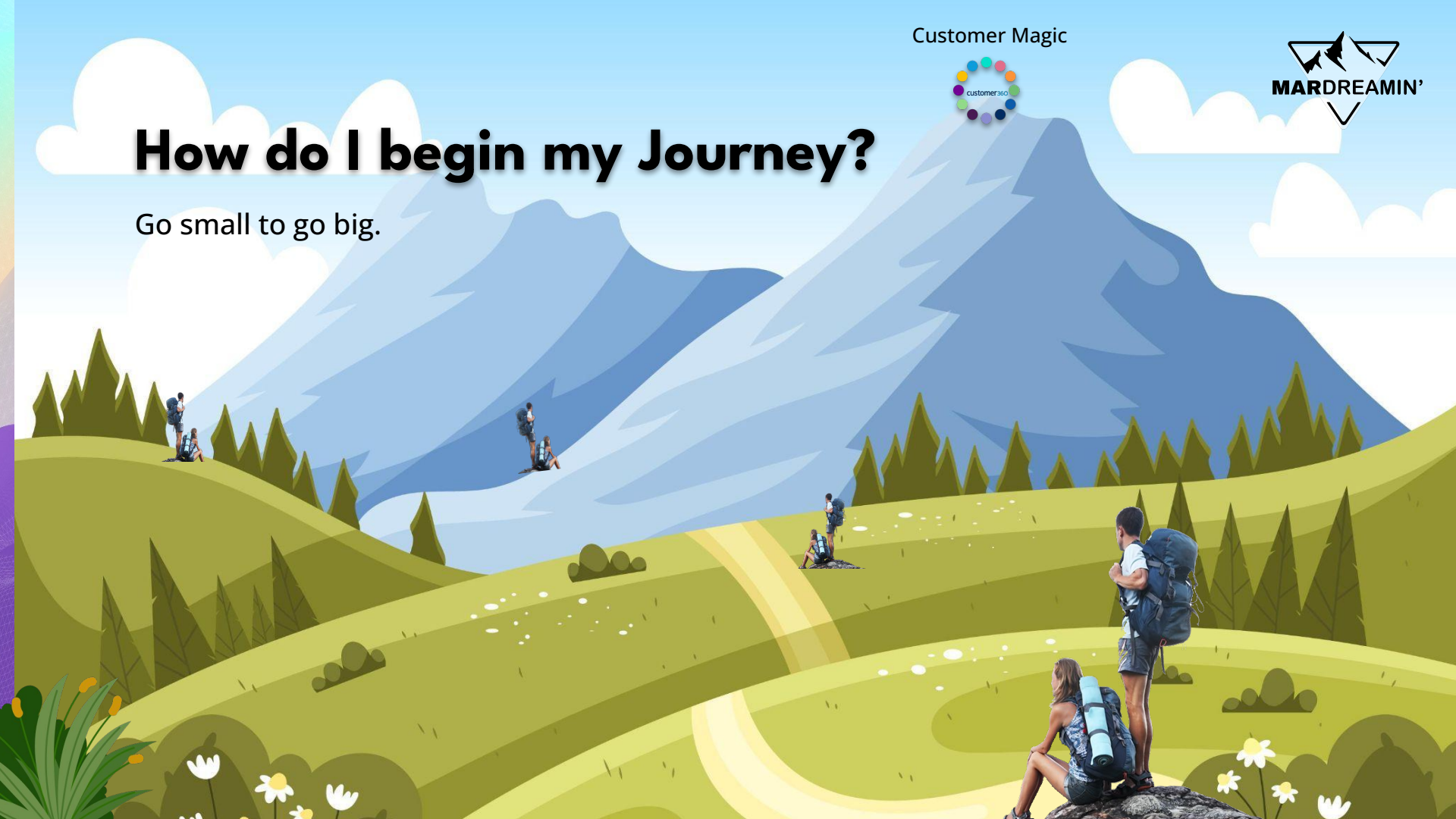




Customer Magic

How do I begin my Journey?

Go small to go big.



How do I begin my Journey?

Think of it as an expedition

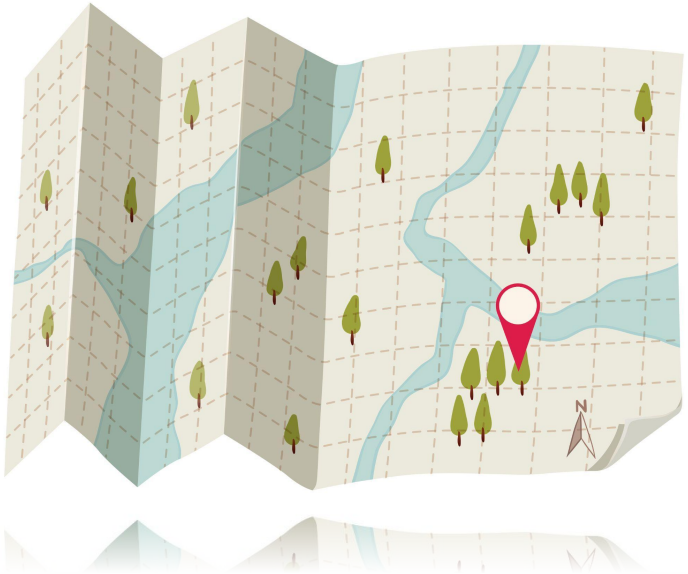
- Pick a Summit
- Set your expectations
- Choose the right kit
- Travel light
- Train properly
- Pace yourself
- Savour each day and set achievable goals

The Journey

Base Camp	Class 1 Beginner	Class 2 Intermediate	Class 3 Advanced
• Define your pursuit • Right size your effort • Set your expectations	• Understand your ecosystem and resources • Focus on areas of impact (email? Data? Reporting?) • Experiment with readily available tools • Learn, measure, adjust	• Build on your previous effort • Add capabilities (people, technical) • Assemble cross functional teams and strategy • Focus on areas of impact (generative AI, data harmonization? Automation?) • Learn, measure, adjust	• Establish an organization wide strategy • Center of Excellence with Interdisciplinary teams • Maximize your technical investments • Focus on areas of impact (Data Unification and harmonization, Hyper Personalized at scale) • Learn, measure, adjust

What does Base Camp Look Like?

- **Assess your current state:** what does my organization's ecosystem looks like?



What does Base Camp Look Like?

- **Craft a strategy:** what are my team goals? How do they support our organization's goals? What does our cross-functional team look like and how do we work together?

What does Base Camp Look Like?

- **Focus**: what areas of impact? Data? Content? Reporting? Personalization?

What does Base Camp Look Like?

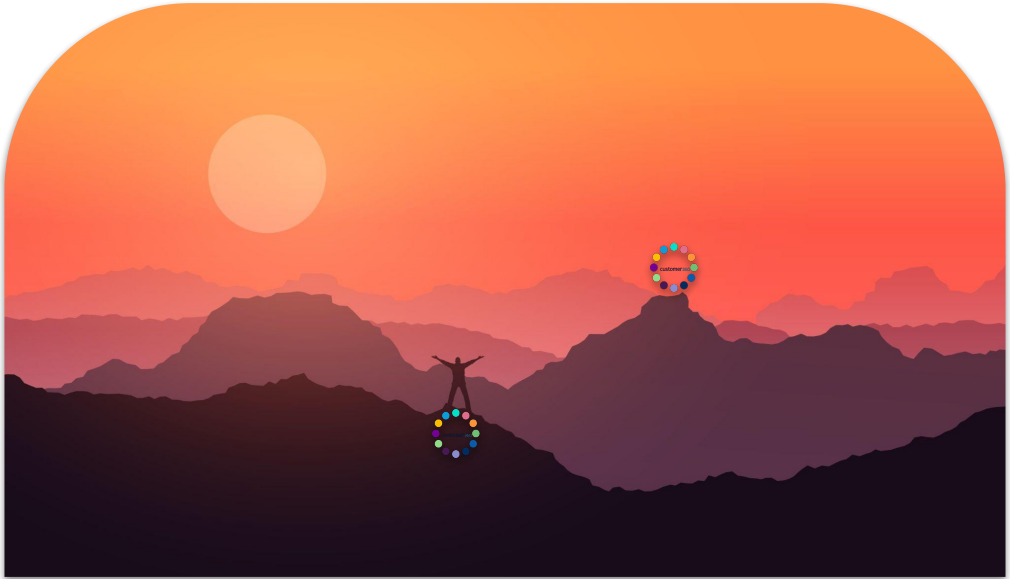
- **Upskill**: build yourself and your team. Create an environment of empowerment and confidence.

What does Base Camp Look Like?

- **Be Patient:** bringing this vision to life will be a journey. It will require stamina and lots of collaboration.

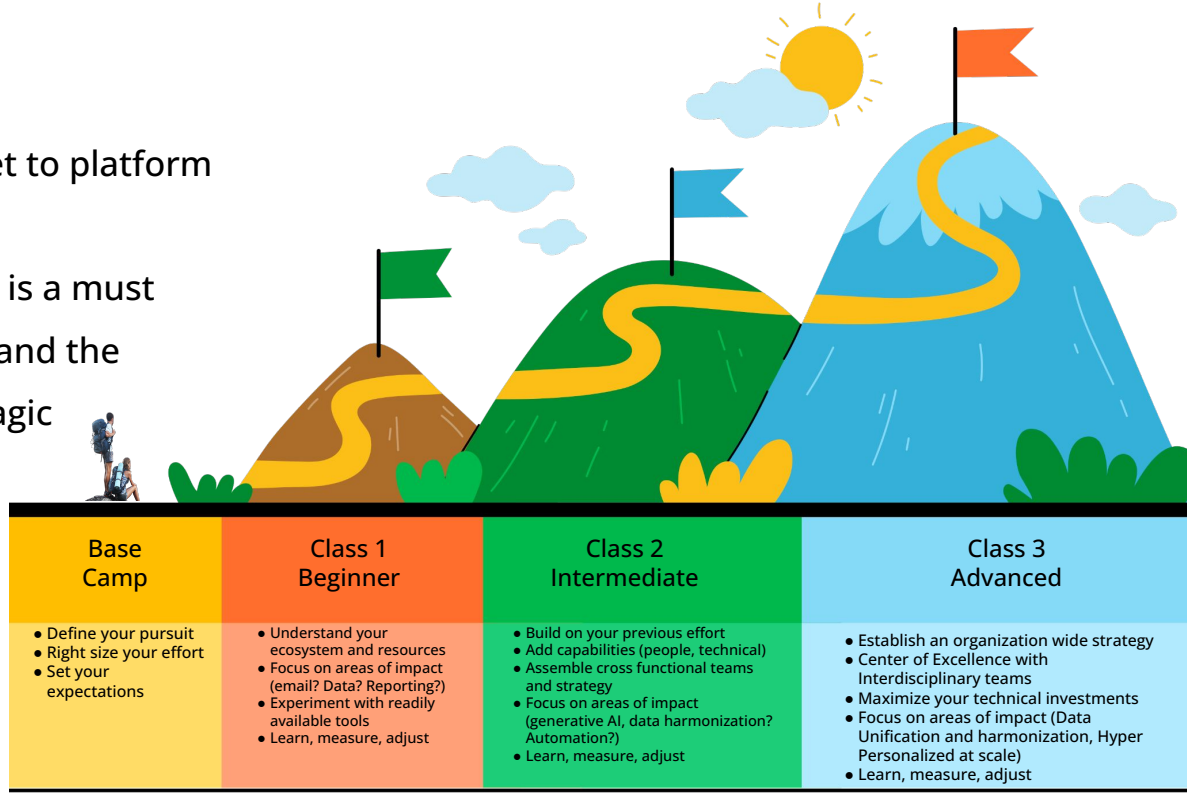
What does Base Camp Look Like?

- **Celebrate your success, iterate and keep climbing!**



Takeaways

- AI + Data + CRM is a Journey
- Understand your ecosystem
- Start shifting product mindset to platform mindset
- Cross Functional partnership is a must
- Data is a great place to start and the cornerstone for customer magic
- Start now!



Thank You!

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