



Demystifying AI + Data + CRM: Where to start



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 **GRIDMATE**

THE SPOT
by SERCANTE

FÍONTA

Agenda

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



Customer Magic



These are Exciting Times!

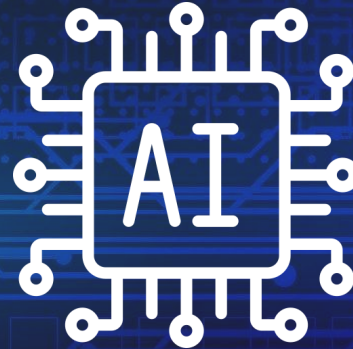
C₃ H₄ A₁ N₁ G₂ E₁



Today's Business world



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



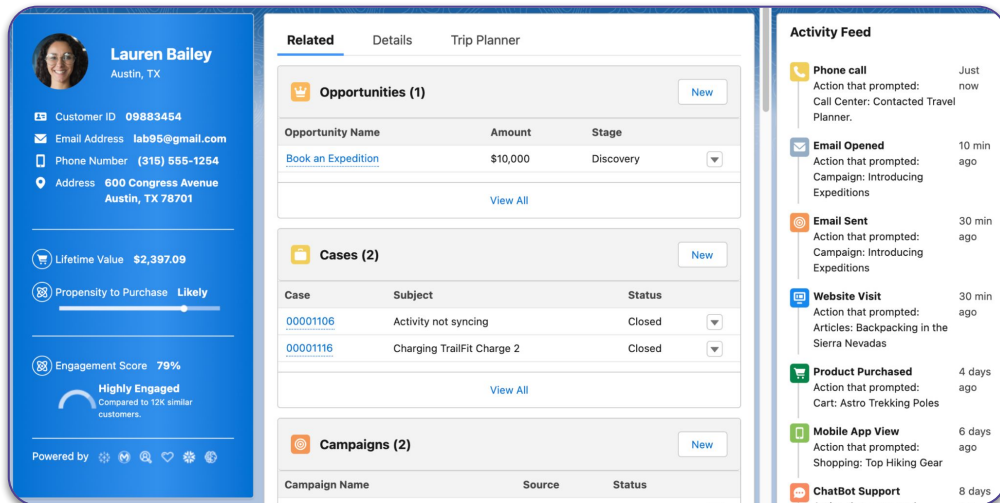
63% of marketing leaders are planning to invest in generative AI in the next 24 months

Customer 360



Customer Magic

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



The screenshot displays a customer profile for Lauren Bailey in Austin, TX. The profile includes contact information, engagement metrics, and a detailed activity feed.

Customer Profile:

- Name:** Lauren Bailey, Austin, TX
- Customer ID:** 09883454
- Email Address:** lab95@gmail.com
- Phone Number:** (315) 555-1254
- Address:** 600 Congress Avenue, Austin, TX 78701
- Lifetime Value:** \$2,397.09
- Propensity to Purchase:** Likely
- Engagement Score:** 79%
- Highly Engaged:** Considered to 12X similar customers.

Activity Feed:

- Phone call:** Action that prompted: Call Center: Contacted Travel Planner. Just now
- Email Opened:** Action that prompted: Campaign: Introducing Expeditions. 10 min ago
- Email Sent:** Action that prompted: Campaign: Introducing Expeditions. 30 min ago
- Website Visit:** Action that prompted: Articles: Backpacking in the Sierra Nevadas. 30 min ago
- Product Purchased:** Action that prompted: Cart: Astro Trekking Poles. 4 days ago
- Mobile App View:** Action that prompted: Shopping: Top Hiking Gear. 6 days ago
- ChatBot Support:** 8 days ago

Related Sections:

- Opportunities (1):**

Opportunity Name	Amount	Stage
Book an Expedition	\$10,000	Discovery
- Cases (2):**

Case	Subject	Status
00001106	Activity not syncing	Closed
00001116	Charging TrailFit Charge 2	Closed
- Campaigns (2):**

Campaign Name	Source	Status
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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.

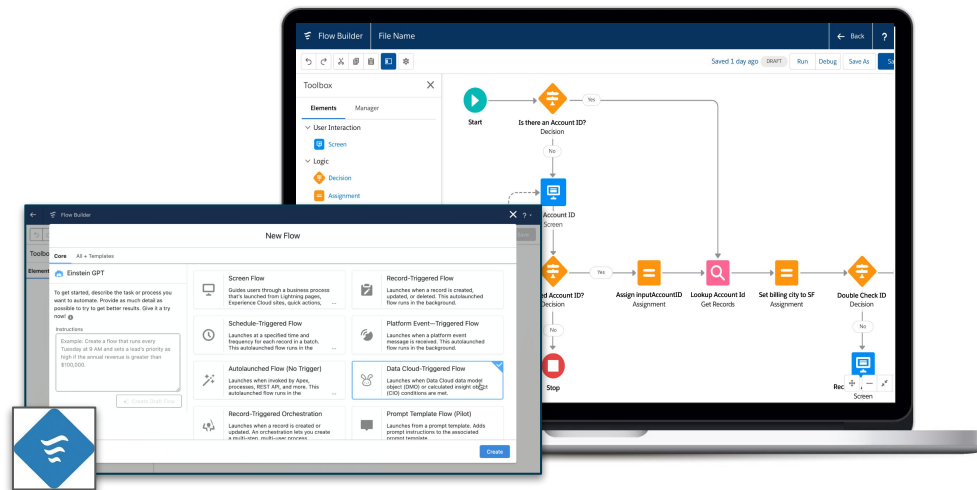
Data Cloud




CRM

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

CRM Automation



Customer Magic



Lauren Bailey
Austin, TX

Customer ID 09883454

Email Address lab95@gmail.com

Phone Number (315) 555-1254


Address 600 Congress Avenue
Austin, TX 78701

Lifetime Value \$2,397.09

Propensity to Purchase Likely

Engagement Score 79%

Highly Engaged
Compared to 12K similar customers.

Powered by 

Related Details Trip Planner

Opportunities (1) New

Opportunity Name	Amount	Stage
Book an Expedition	\$10,000	Discovery

[View All](#)

Cases (2) New








Case	Subject	Status
00001106	Activity not syncing	Closed
00001116	Charging TrailFit Charge 2	Closed

[View All](#)

Campaigns (2) New

Campaign Name	Source	Status
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Activity Feed

-  **Phone call** Just now
Action that prompted: Call Center: Contacted Travel Planner.
-  **Email Opened** 10 min ago
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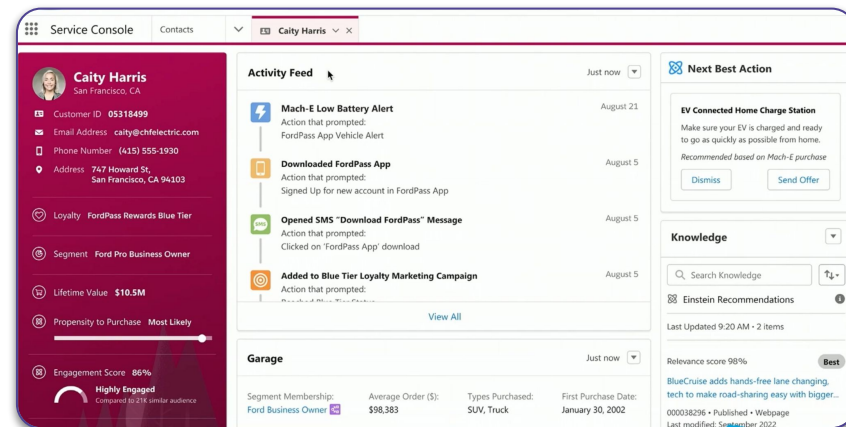
Platform



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



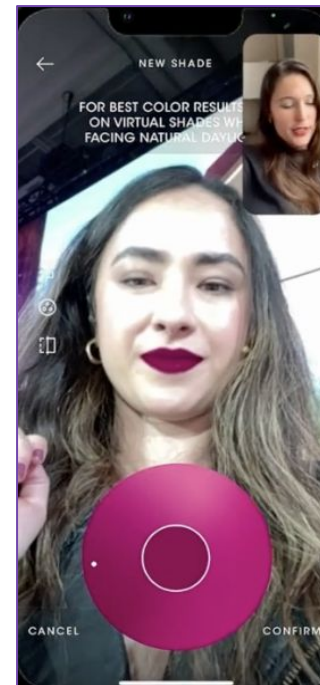
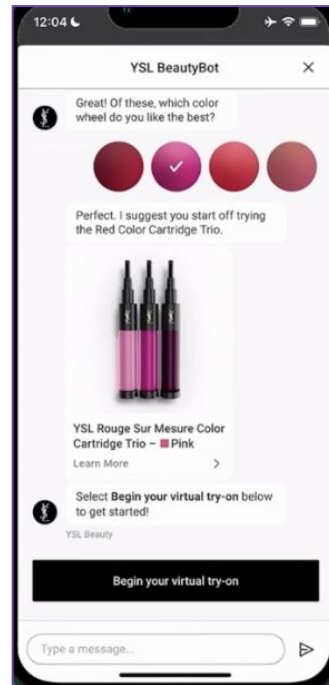
The screenshot displays a Service Console interface for a customer named Caity Harris. The interface is divided into several sections:

- Customer Profile (Left Sidebar):**
 - Caity Harris**, San Francisco, CA
 - Customer ID: 05318499
 - Email Address: caity@cfelectric.com
 - Phone Number: (415) 555-1930
 - Address: 747 Howard St, San Francisco, CA 94103
 - Loyalty: FordPass Rewards Blue Tier
 - Segment: Ford Pro Business Owner
 - Lifetime Value: \$10.5M
 - Propensity to Purchase: Most Likely
 - Engagement Score: 86%
 - Highly Engaged (Compared to 21K similar audience)
- Activity Feed (Center):**
 - Mach-E Low Battery Alert** (August 21): Action that prompted: FordPass App Vehicle Alert
 - Downloaded FordPass App** (August 5): Action that prompted: Signed Up for new account in FordPass App
 - Opened SMS "Download FordPass" Message** (August 5): Action that prompted: Clicked on "FordPass App" download
 - Added to Blue Tier Loyalty Marketing Campaign** (August 5): Action that prompted: [Action that prompted]
- Next Best Action (Right):**
 - EV Connected Home Charge Station**: Make sure your EV is charged and ready to go as quickly as possible from home. Recommended based on Mach-E purchase. [Dismiss] [Send Offer]
- Knowledge (Right):**
 - Search Knowledge
 - Einstein Recommendations
 - Last Updated 9:20 AM - 2 items
 - Relevance score 98% [Best]
 - BlueCruise adds hands-free lane changing tech to make road-sharing easy with bigger...
 - 000038296 • Published • Webpage
 - Last modified: September 2022
- Garage (Bottom):**
 - Segment Memberships: Ford Business Owner
 - Average Order (\$): \$98,383
 - Types Purchased: SUV, Truck
 - First Purchase Date: January 30, 2002

L'Oréal

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

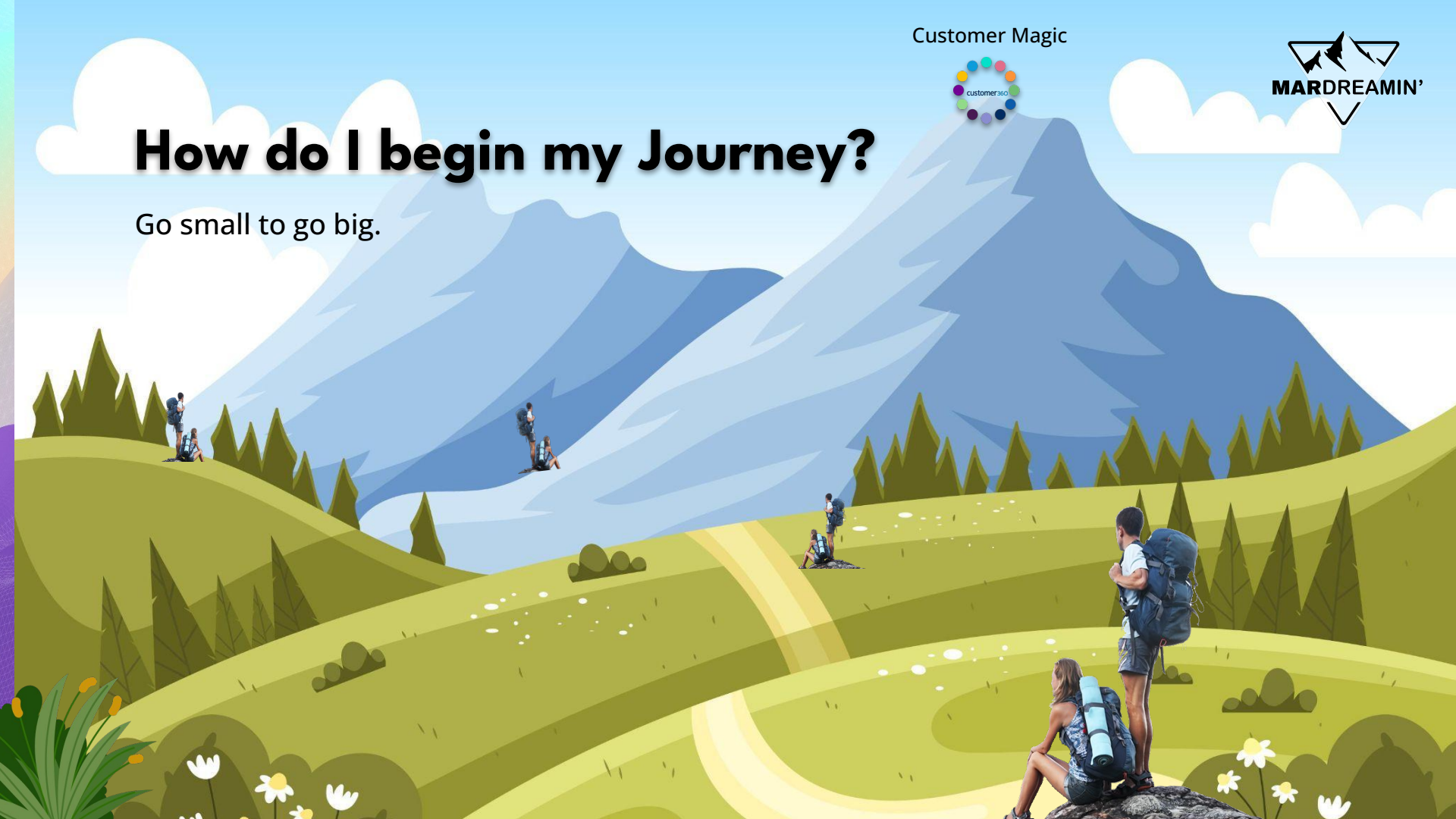
- Beauty tech allows to create the ultimate personalized beauty experience
- Inclusive beauty at global scale
- Leverage century long of data: hair science, skin science, makeup consumer routines



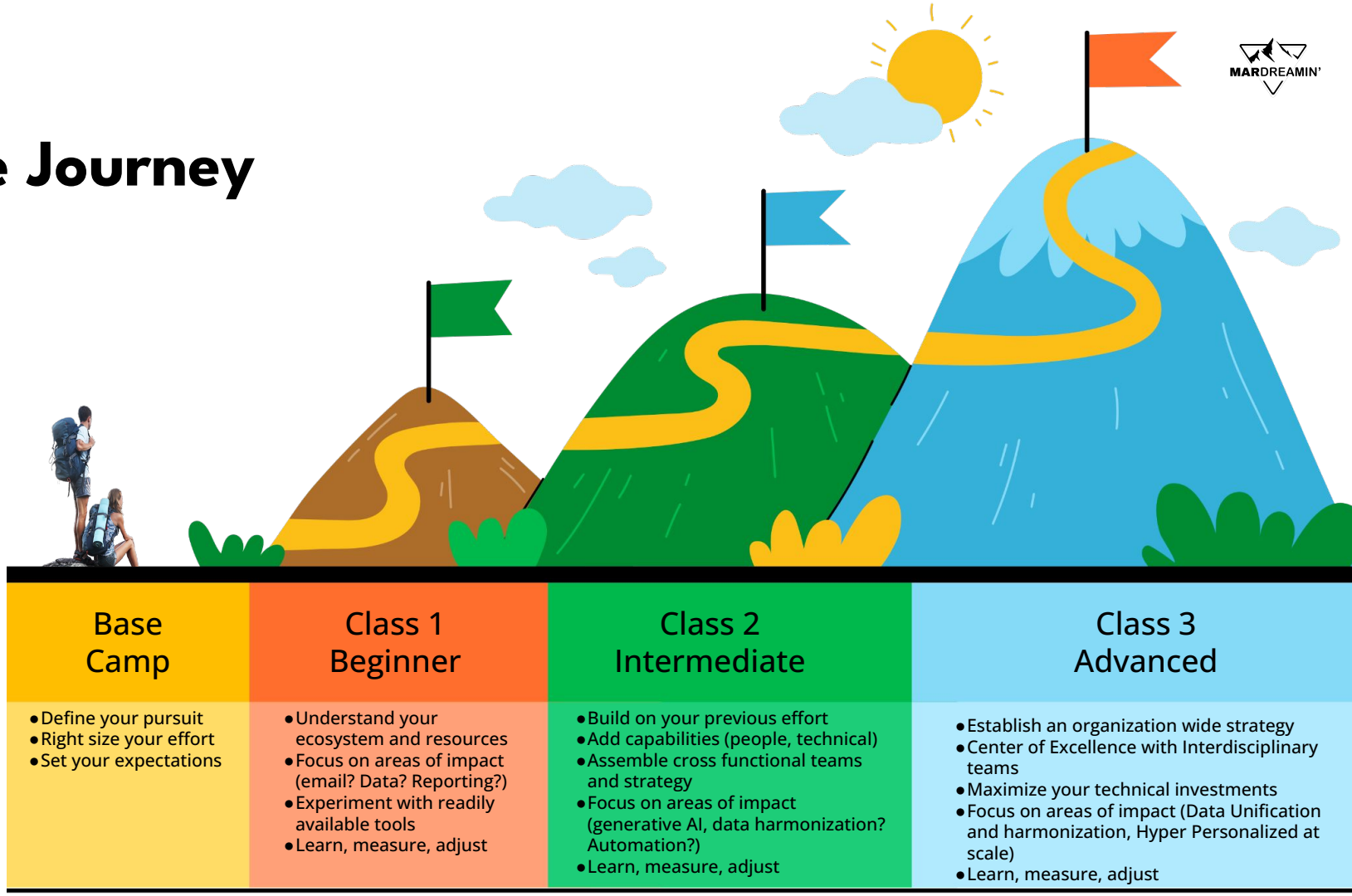


How do I begin my Journey?

Go small to go big.

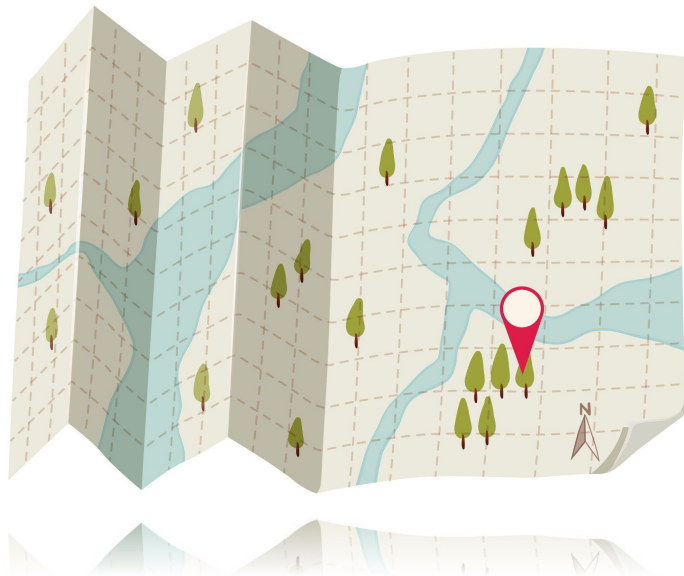


The Journey



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.



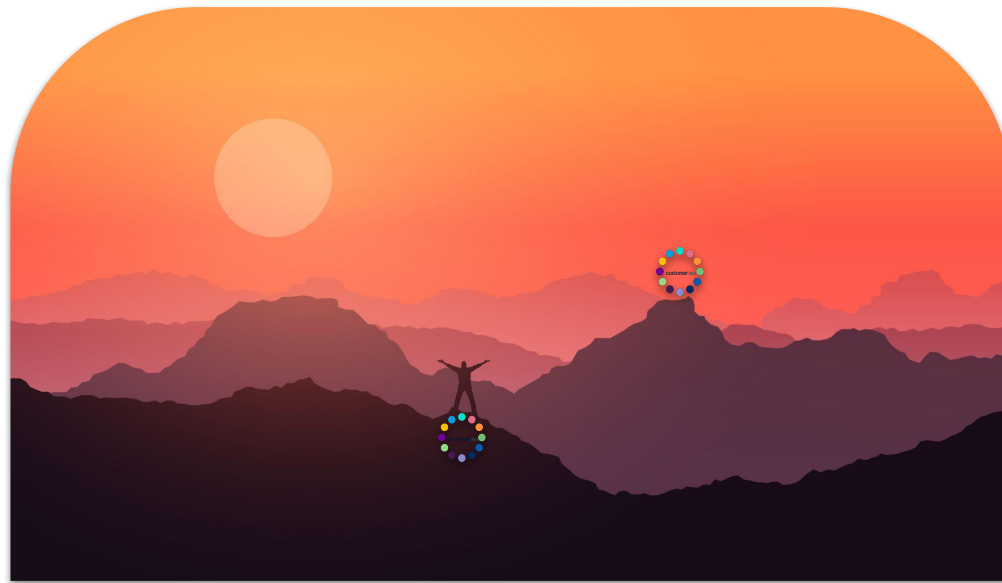
What does Base Camp Look Like?

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



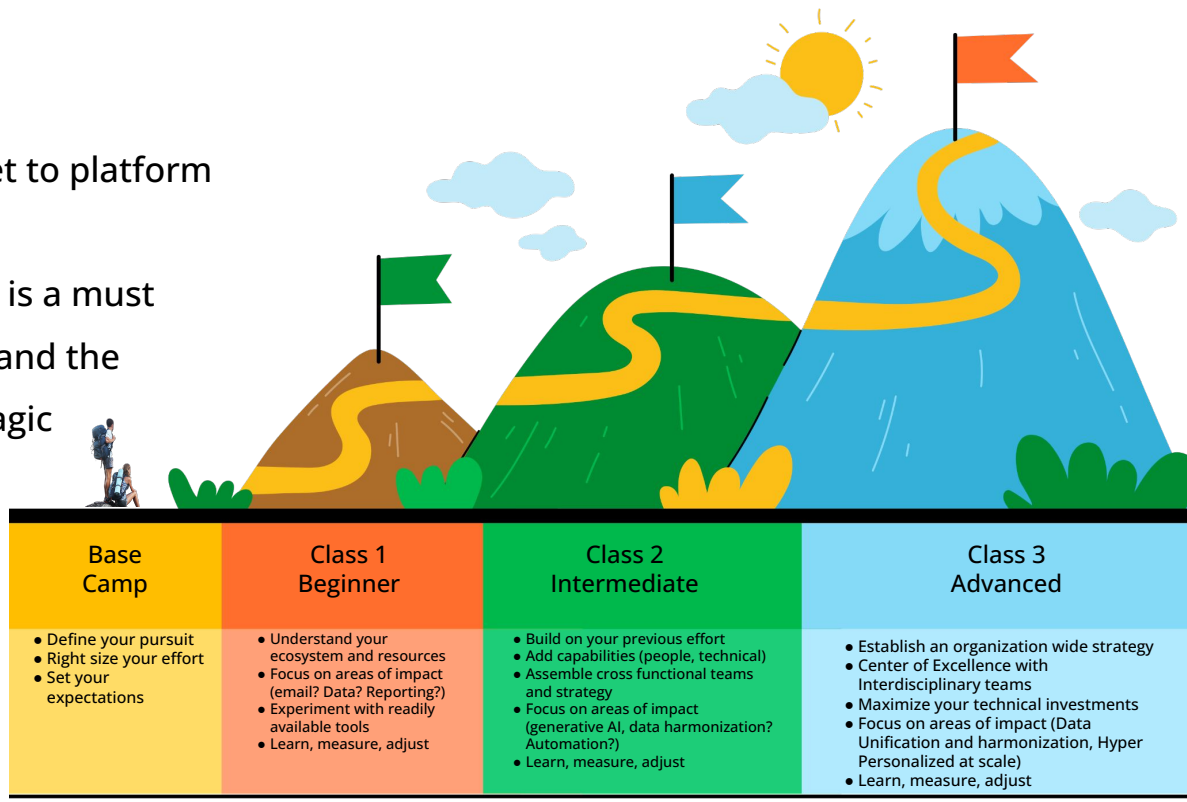
What does Base Camp Look Like?

- 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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