



Master Class

Data Cloud

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Agenda

- 01 What is Data Cloud?
- 02 What is significance of data cloud?
- 03 Key features and modules
- 04 Data Cloud Editions and Licenses
- 05 Data Cloud Use cases
- 06 Principles of Data Ethics



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What is Data Cloud?



Hyperscale data engine built on salesforce Einstein 1 platform to bring all of company data to Salesforce.



Harmonizes data from disparate sources, unify customer profiles, building insights into unified profiles which can be segmented and activated.



Helps build a comprehensive 360-degree view of customers

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Data needs of modern enterprises

- AI Revolution is Data Revolution and data driven companies outperform the rest

Data Management requirements of modern enterprises

Velocity – Ability to ingest data at various speeds/ frequency	Variety – Ability to take in data in multiple models and map to single data model	Veracity – Capability to use matching rules to deduplicate to create unified profile	Volume – Need for a highly scaled, cloud-based infrastructure to store massive amount of fast-moving customer data for processing	Value – Ability to connect data to systems to derive value for enterprise-wide digital transformation
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Challenges in meeting data needs

Most of the company applications are disconnected

Data is present in various applications (average company uses 1061 different applications).

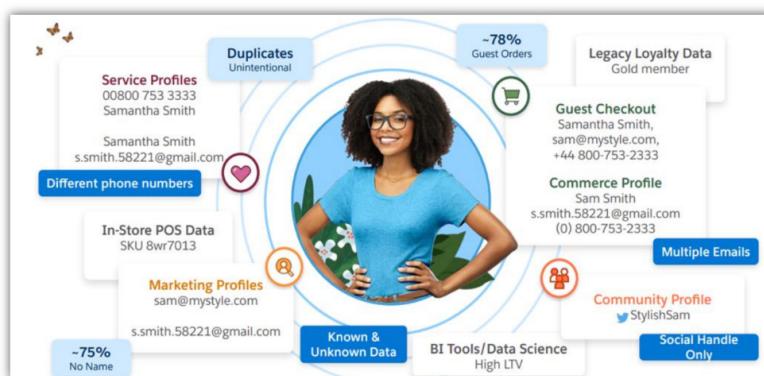
Difficult to create single source of truth –

- Multiple, duplicate phone numbers
- Multiple email addresses
- Known and unknown data
- Social profiles
- No-name profiles
- Guest users



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Challenges in creating unified profile



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HANDS-ON SCENARIO

Customer name - General Alan International Airport

Customers of 'General Alan International Airport' can login on the airport website via following ways –

- For airport parking - Only Booking of parking and airport lounge and managing/cancelling of bookings
- For airport rewards – For Shopping services and Food services, Booking of parking and airport lounge and managing/cancelling of bookings, Reward Management (Collect Points, Spend Points, Transfer, Account Management), On help page, fill up form for complaints, enquiries and Thank you.
- If not logged in, use chatbot on bottom right of page, enter first name, last name and email address - Raise a case using chatbot

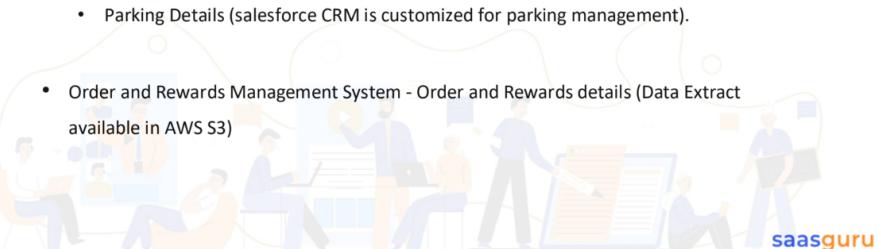


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Hands-on Scenario

So potentially same customer information is present in 2 different applications –

- Salesforce CRM:
 - cases created by logged in customers and via chatbot
 - Parking Details (salesforce CRM is customized for parking management).
- Order and Rewards Management System - Order and Rewards details (Data Extract available in AWS S3)



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Hands-on Scenario

» Types of Cases

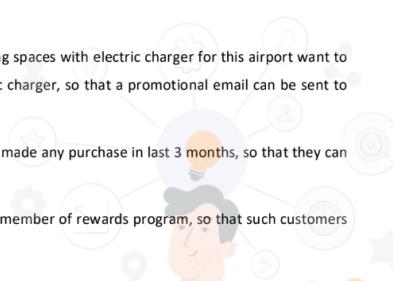
Type	Sub-type (independent from type)
Complaint	Assistance and accessibility
Inquiry	Car Parking
Thank you	Health and Safety
	Rewards
	Shopping



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Hands-on Scenario

1. General Alan International Airport wants to increase number of parking spaces with electric charger for this airport want to customers who have previously parked in parking spaces with electric charger, so that a promotional email can be sent to such customer.
2. Identify customers who have high loyalty points balance and have not made any purchase in last 3 months, so that they can be informed ways in which they can redeem their loyalty points
3. Identify customer who have given low CSAT score in the past and are member of rewards program, so that such customers can be compensated appropriately
4. General Alan International Airport wants to decommission "Login to General Alan International Airport Parking" and

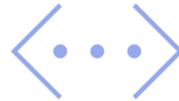


General Alan International Airport wants to decommission legacy General Alan International Airport Parking and continue with only login via General Alan International Airport Rewards to provide seamless experience on website and app. Identify customers who have only General Alan International Airport Parking and not General Alan International Airport Rewards so that such customers can be informed about this proposed change.

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Hands-on Exercise

Create Data Cloud trial org, validate that data cloud is enabled and provide view all access to required objects and fields.



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Data Cloud Features



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Connect

Effortlessly integrate extensive customer data from various sources, including apps, devices, and live streams, utilizing pre-built connectors.

Utilize a diverse range of pre-configured connectors to seamlessly integrate data sources. These connectors encompass various Salesforce clouds, popular cloud storage platforms like Amazon S3 and Google Cloud, as well as live streaming data from web and mobile platforms. Additionally, they support APIs integrated with MuleSoft and custom API connectors. Leveraging these connectors speeds up incorporating additional data from multiple data lakes

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Harmonize

Systematically arrange the amalgamated customer data into a cohesive, standardized data model

aligned with the Salesforce Customer 360 Platform.

Efficiently ingest and transform data either in streaming or batches through intuitive clicks, eliminating the need for manual coding. Following ingestion, the data is automatically mapped to a standardized data model aligned with Salesforce Customer 360. This guarantees that Data Cloud maintains a consistent method of identifying entities ranging from individuals to transactions to channel engagements.

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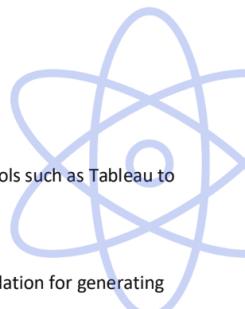
Unify

Utilize a consolidated customer graph to anticipate and adapt to customer preferences and requirements in real-time, presenting unified profiles reflecting their interactions.

Data Cloud's identity resolution feature enables customers to consolidate identities and match them across shared data attributes, such as email addresses or combinations of first and last names. This process culminates in the creation of a unified perspective for each customer, facilitating comprehensive insights and analysis.

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Analyze and Predict



Extract valuable insights from unified customer data using robust analytical tools such as Tableau to forecast trends and patterns.

Standardized and unified customer data within Data Cloud serves as the foundation for generating insights such as Customer Lifetime Value. This data can seamlessly integrate with external artificial intelligence (AI) or Business Intelligence (BI) tools, enabling predictive analytics, personalized recommendations, and data exploration.

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Activate



Empower teams with unified customer profiles to create intelligent, automated experiences seamlessly across the Customer 360 platform, equipping them with comprehensive customer insights during interactions.

Organizations can leverage this data to take action, whether updating Lightning pages in App Builder or initiating Flows. This empowers real-time decision-making, enhances applications, enables advanced analytics, and more, all within a single platform.

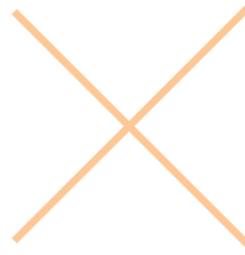
Furthermore, unified customer segments can be seamlessly disseminated to advertising or marketing platforms. Data Cloud consolidates all Salesforce Platform data, streamlining processes and facilitating the creation of tailored customer experiences.

Data Cloud Lifecycle



Data Cloud is not

- Tool for data cleansing
- Master Data Management (MDM) tool
- For Golden record creation
- For Data Governance
- For Backup and Disaster recovery
- A Business Intelligence (BI) platform



Data Cloud Editions and Licenses

Available in Developer, Enterprise, Performance and Unlimited editions.

Following add-on licenses are needed for some of the features

Feature License	Purpose
Ad Audiences	Generate segments within Data Cloud that are readily deployable to advertising platforms such as Meta.
Data Spaces	Enhance your data organization by incorporating multiple data spaces into your account.
Segmentation and Activation	Generate segments and perform batch activations within Data Cloud.

Salesforce Data Cloud Use Cases

» Financial Services

Utilize Segments to pinpoint significant life milestones, like graduation, first job, marriage, childbirth, divorce, retirement, or inheritance, to foster deposit growth and revenue generation.

» Healthcare and Life science

Integrate Data Cloud seamlessly with various health telematics systems to compute a Unified Health Score or pinpoint critical intervention points in patient care.

Leverage Streaming Insights to identify potential fraudulent transactions promptly and initiate real-time communications to prompt customers to review any suspicious activity.

Onboard healthcare providers efficiently and minimize churn risk with consolidated insights across multiple channels.

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Salesforce Data Cloud Use Cases

»» Retail and Consumer Goods

Consolidate consumer profiles to pinpoint key target audiences for customized advertisements and discover new potential audiences through look-alike modeling. Target audiences based on top purchases, top-tier loyalty, and highly engaged customers.
Utilize real-time engagement data to identify pivotal moments in the customer journey, ranging from abandoned carts to delivery notifications.

»» Media and Communication

Determine the optimal purchase window for new devices and services by amalgamating historical transactions with real-time behavioral data.
Transform customer service into an upselling opportunity by fostering a shared Customer 360 view encompassing subscription management and sales

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Salesforce Data Cloud Use Cases

»» Customer Service

Enhance problem resolution by accessing a customer's real-time unified profile, including their past service interactions, marketing engagements, and loyalty or lifetime value score

»» Sales

Determine the optimal purchase window for new devices and services by amalgamating historical transactions with real-time behavioral data.
Transform customer service into an upselling opportunity by fostering a shared Customer 360 view encompassing subscription management and sales

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Salesforce Data Cloud Use Cases

»» Marketing

Deliver hyper-personalized communications across web, email, and advertising channels using unified profiles in real time.

»» Commerce

Enable automatic, personalized experiences by leveraging real-time unified profile data to tailor pricing, promotions, and product recommendations.

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Salesforce Data Cloud Use Cases

» Analytics

Harness the power of Tableau with real-time data to gain deeper insights into customer behavior and share findings across teams for informed decision-making and enhanced targeting efforts.



Applying principles of data ethics in Data Cloud



Respect customer preferences

- Ensure that customer preferences are respected, and organizations are held accountable for maintaining these preferences.
- Utilize unified profiles to monitor customer preferences across all omnichannel marketing endeavors.



Transparent Value Exchange

- Offer clear and tangible benefits to customers in exchange for their data and transparently communicate these benefits to establish trust.



Handle Sensitive Data with Care

- Exercise caution when dealing with sensitive data attributes such as age, gender, ethnicity, citizenship, political affiliation, and sexual orientation.

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Applying principles of data ethics in Data Cloud

Minimize Data Collection

- Collect and utilize only the necessary data, avoiding unnecessary gathering of demographic, socioeconomic, behavioral, and transactional data.

Carefully select partners

- When sharing data with third-party partners for advertising purposes, carefully select partners and understand the data's chain of custody.
- Review contracts with activation partners to ensure clear obligations regarding the handling, custody, and control of shared data.
- Ensure partners properly delete or dispose of data as required.
- Partner with entities that uphold strong data ethics practices to mitigate risks and safeguard customer privacy.

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Pop Quiz



What are the Data Cloud steps in order?

1. Harmonize, ingest, unify and act on Data
2. Act, harmonize, ingest and unify data
3. Ingest, harmonize, unify and act on data
4. Unify, act, harmonize and ingest data

Pop Quiz

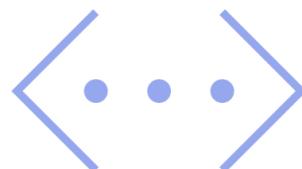


Which of these is NOT a good data ethics practice?

1. Treat sensitive data carefully
2. Obey consent and the context in which it was given
3. Choose partners who will give you a commission for selling your customers' data
4. Collect and use only necessary customer data

Hands-on Exercise

Create an account on Amazon Web Services



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Thank you

