

# Cactusforce 2024

Ryan Cox

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Distinguished Technical Architect

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## Salesforce Data Cloud - Technical Architecture Deep Dive

# Forward Looking Statements

This presentation contains forward-looking statements about, among other things, trend analyses and future events, future financial performance, anticipated growth, industry prospects, environmental, social and governance goals, and the anticipated benefits of acquired companies. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, Salesforce's results could differ materially from the results expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: impact of, and actions we may take in response to, the COVID-19 pandemic, related public health measures and resulting economic downturn and market volatility; our ability to maintain security levels and service performance meeting the expectations of our customers, and the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate performance degradation and security breaches; the expenses associated with our data centers and third-party infrastructure providers; our ability to secure additional data center capacity; our reliance on third-party hardware, software and platform providers; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy, cross-border data transfers and import and export controls; current and potential litigation involving us or our industry, including litigation involving acquired entities such as Tableau Software, Inc. and Slack Technologies, Inc., and the resolution or settlement thereof; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including any efforts to expand our services; the success of our strategy of acquiring or making investments in complementary businesses, joint ventures, services, technologies and intellectual property rights; our ability to complete, on a timely basis or at all, announced transactions; our ability to realize the benefits from acquisitions, strategic partnerships, joint ventures and investments, including our July 2021 acquisition of Slack Technologies, Inc., and successfully integrate acquired businesses and technologies; our ability to compete in the markets in which we participate; the success of our business strategy and our plan to build our business, including our strategy to be a leading provider of enterprise cloud computing applications and platforms; our ability to execute our business plans; our ability to continue to grow unearned revenue and remaining performance obligation; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; our ability to limit customer attrition and costs related to those efforts; the success of our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations, including as a result of acquisitions; our ability to preserve our workplace culture, including as a result of our decisions regarding our current and future office environments or work-from-home policies; our dependency on the development and maintenance of the infrastructure of the Internet; our real estate and office facilities strategy and related costs and uncertainties; fluctuations in, and our ability to predict, our operating results and cash flows; the variability in our results arising from the accounting for term license revenue products; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; the impact of future gains or losses from our strategic investment portfolio, including gains or losses from overall market conditions that may affect the publicly traded companies within our strategic investment portfolio; our ability to protect our intellectual property rights; our ability to develop our brands; the impact of foreign currency exchange rate and interest rate fluctuations on our results; the valuation of our deferred tax assets and the release of related valuation allowances; the potential availability of additional tax assets in the future; the impact of new accounting pronouncements and tax laws; uncertainties affecting our ability to estimate our tax rate; uncertainties regarding our tax obligations in connection with potential jurisdictional transfers of intellectual property, including the tax rate, the timing of the transfer and the value of such transferred intellectual property; uncertainties regarding the effect of general economic and market conditions; the impact of geopolitical events; uncertainties regarding the impact of expensing stock options and other equity awards; the sufficiency of our capital resources; the ability to execute our Share Repurchase Program; our ability to comply with our debt covenants and lease obligations; the impact of climate change, natural disasters and actual or threatened public health emergencies; and our ability to achieve our aspirations, goals and projections related to our environmental, social and governance initiatives.

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✍ Data Cloud Overview

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💡 Architecture Deeper Dive

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📝 CRM Enrichment

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🚀 Demo

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🔖 Resources

# Agenda



**Data Cloud** is Salesforce's hyperscale, (near) real-time data platform deeply integrated into the Salesforce Platform.



**Data Cloud** is Salesforce's hyperscale, (near) real-time data platform deeply integrated into the Salesforce Platform.

## DATA

### Data Foundation

*Unlock data across business units*

## AI

### Predictive AI

*Predict behavior across channels*

### Generative AI

*Recommend actions across channels*

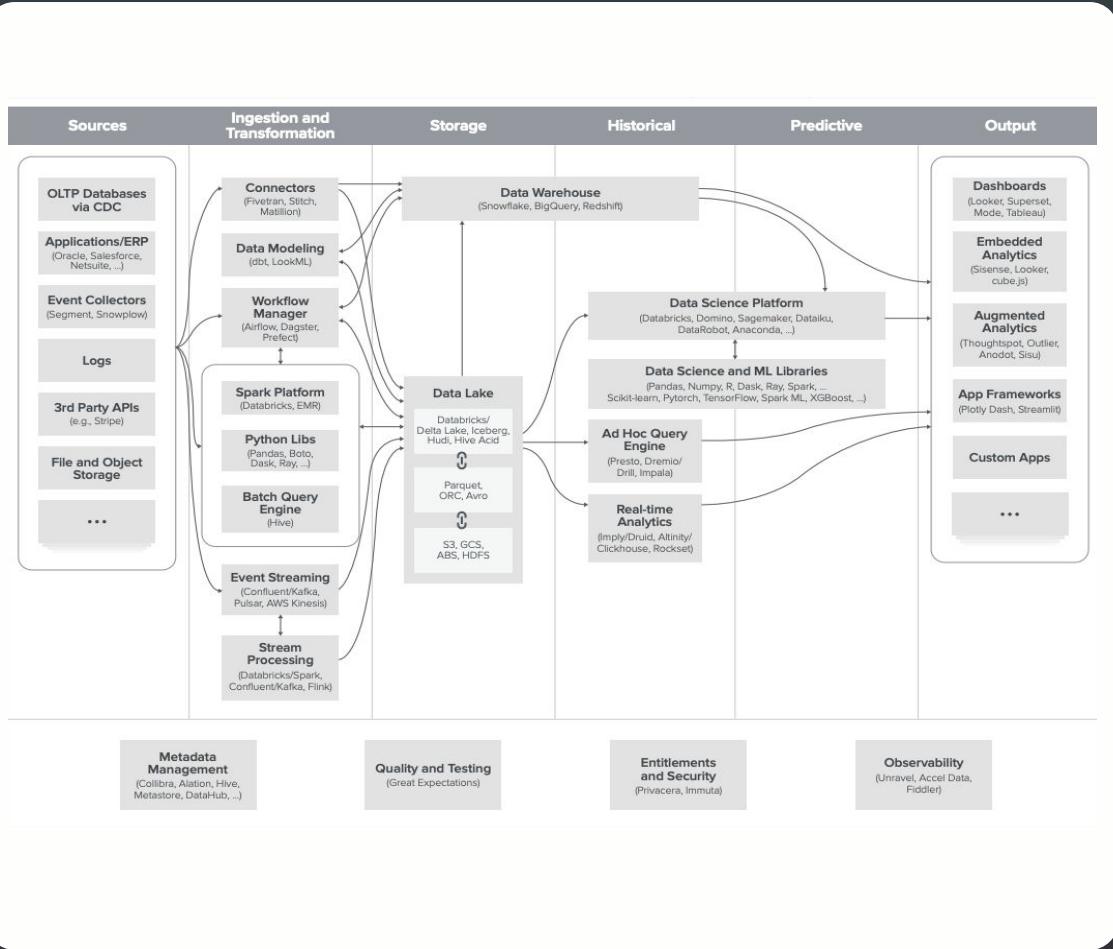
## CRM

### Personalized experiences for every User

*Personalized actions across channels*



# Data Lakes in the Wild



...and multiple data patterns require different technology.

## Real-Time Decisioning

- Real-time Eventing
- Real-time IR
- Real-time Segments
- Real-time Actions

## Machine-Learning Processing

- Data Snapshots
- Feature Store/ Insights
- Batch/Stream Transformations
- SQL/File Access

## Applications

- Profiles, Engagement Data
- SQL, SOQL
- REST APIs
- Metadata

## Event Processing

- Streaming Ingest
- Streaming Transforms
- Window Aggregates (last 5 min purchase etc.)
- Streaming Actions - Pub-Sub

## Analytics

- Batch Ingest
- Batch Transforms
- Batch Insights
- Columnar Stores
- SQL

## Lakehouse

- Delta Change Capture
- Large Scale
- File Formats

Commonality - Data, Metadata, Insights

# How Data Cloud Works



# Salesforce Well-Architected



## Salesforce Well-Architected Framework



### Trusted

Secure

Compliant

Reliable



### Easy

Intentional

Automated

Engaging



### Adaptable

Resilient

Composable

<https://architect.salesforce.com/well-architected>

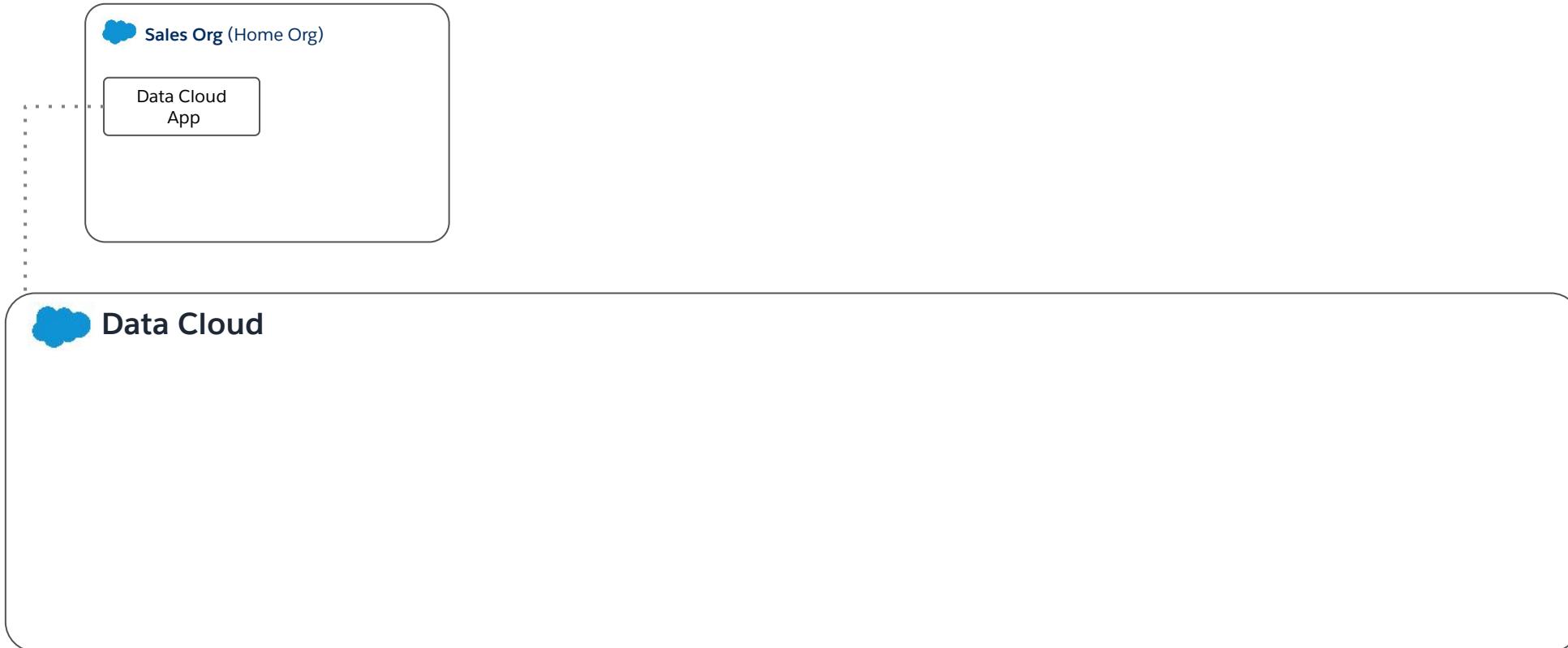
# Architecture Deeper Dive

Data Cloud within your Enterprise Architecture



# Data Cloud

Data Cloud Instance



# Data Cloud

Batch Data Ingestion and Harmonization

Frequency

Real-time

2 mins

Up to 15 mins

12 hrs

5 mins

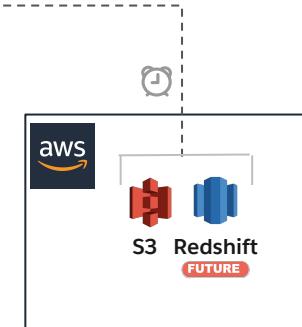
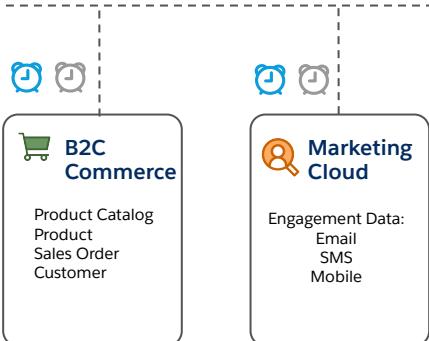
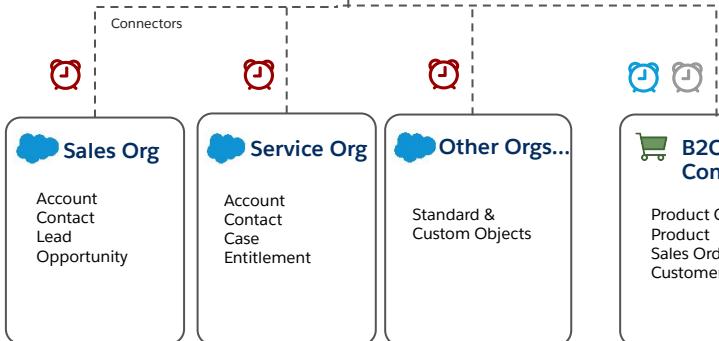
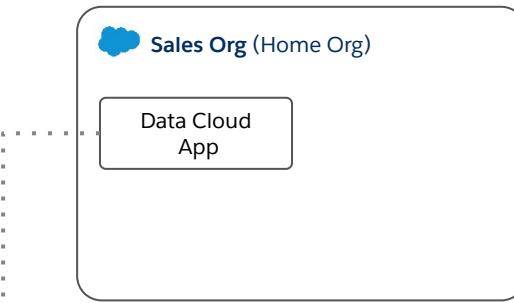
10 mins

Hourly

Daily

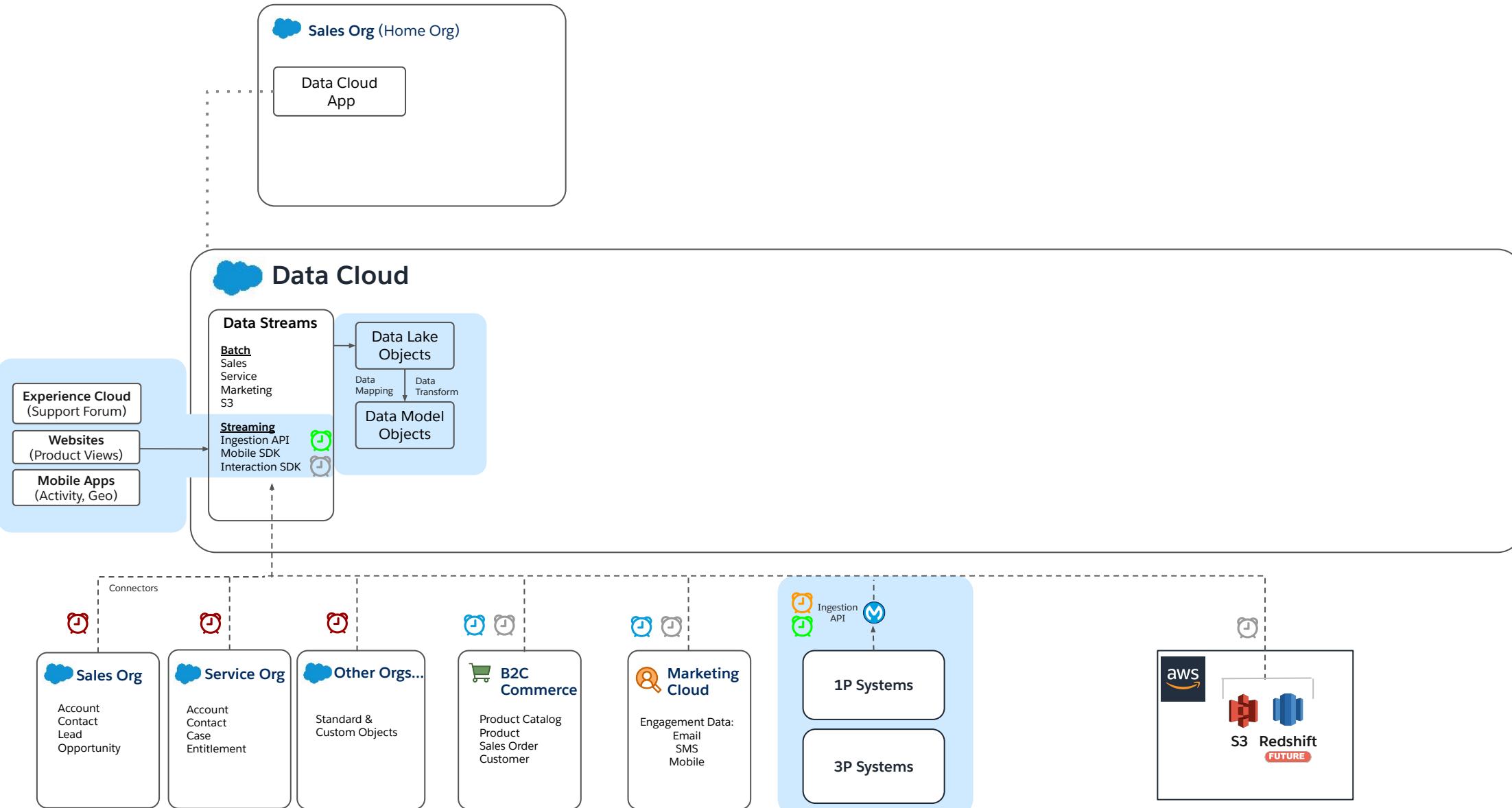
Real-Time

Scheduled or Async



# Data Cloud

# Streaming Data Ingestion and Ingestion API



# Data Cloud

Bring Your Own Lake (BYOL)

Frequency

Real-time

2 mins

Up to 15 mins

12 hrs

5 mins

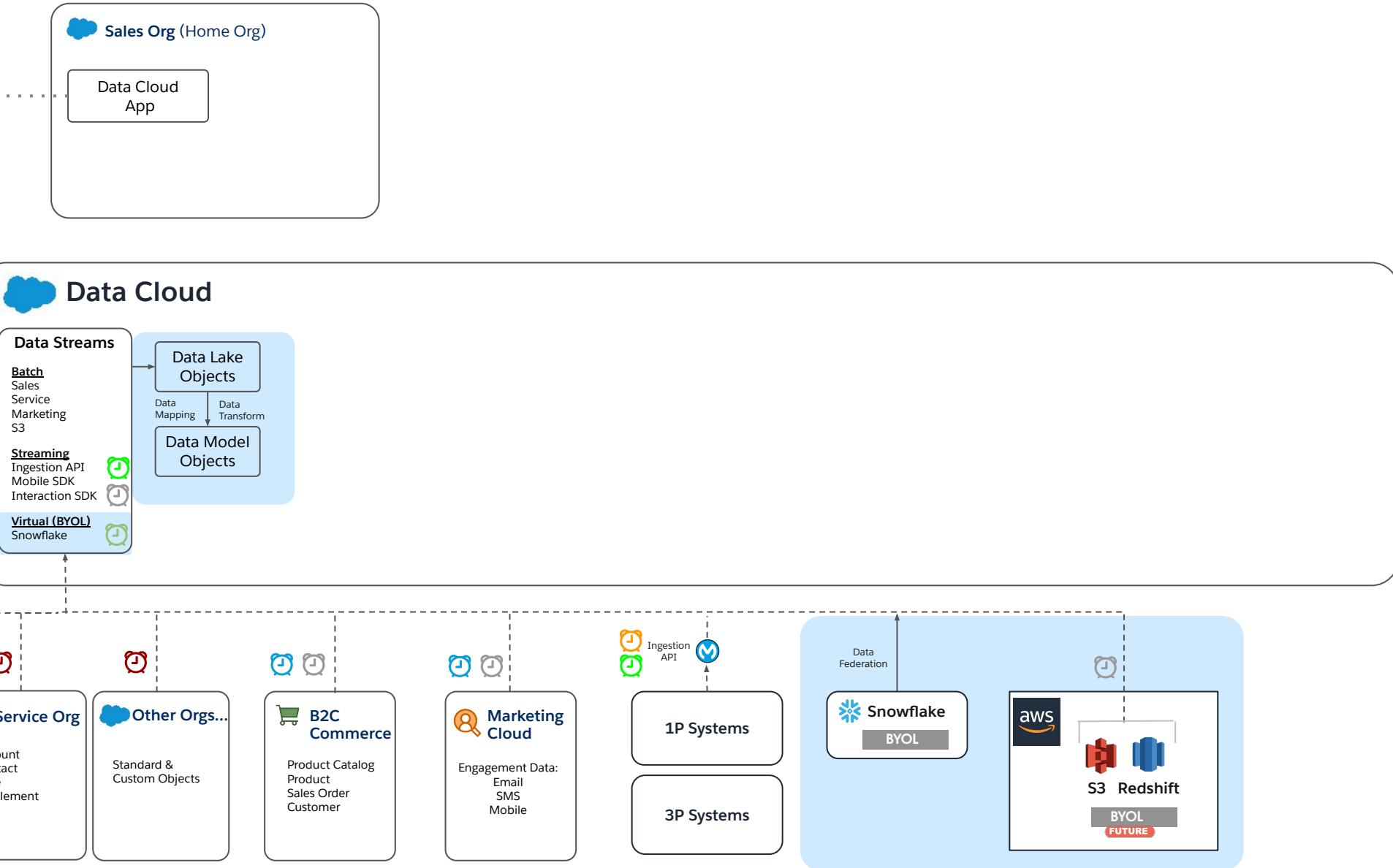
10 mins

Hourly

Daily

Real-Time

Scheduled or Async



# Data Cloud

Profile Unification

Frequency

Real-time

2 mins

Up to 15 mins

12 hrs

5 mins

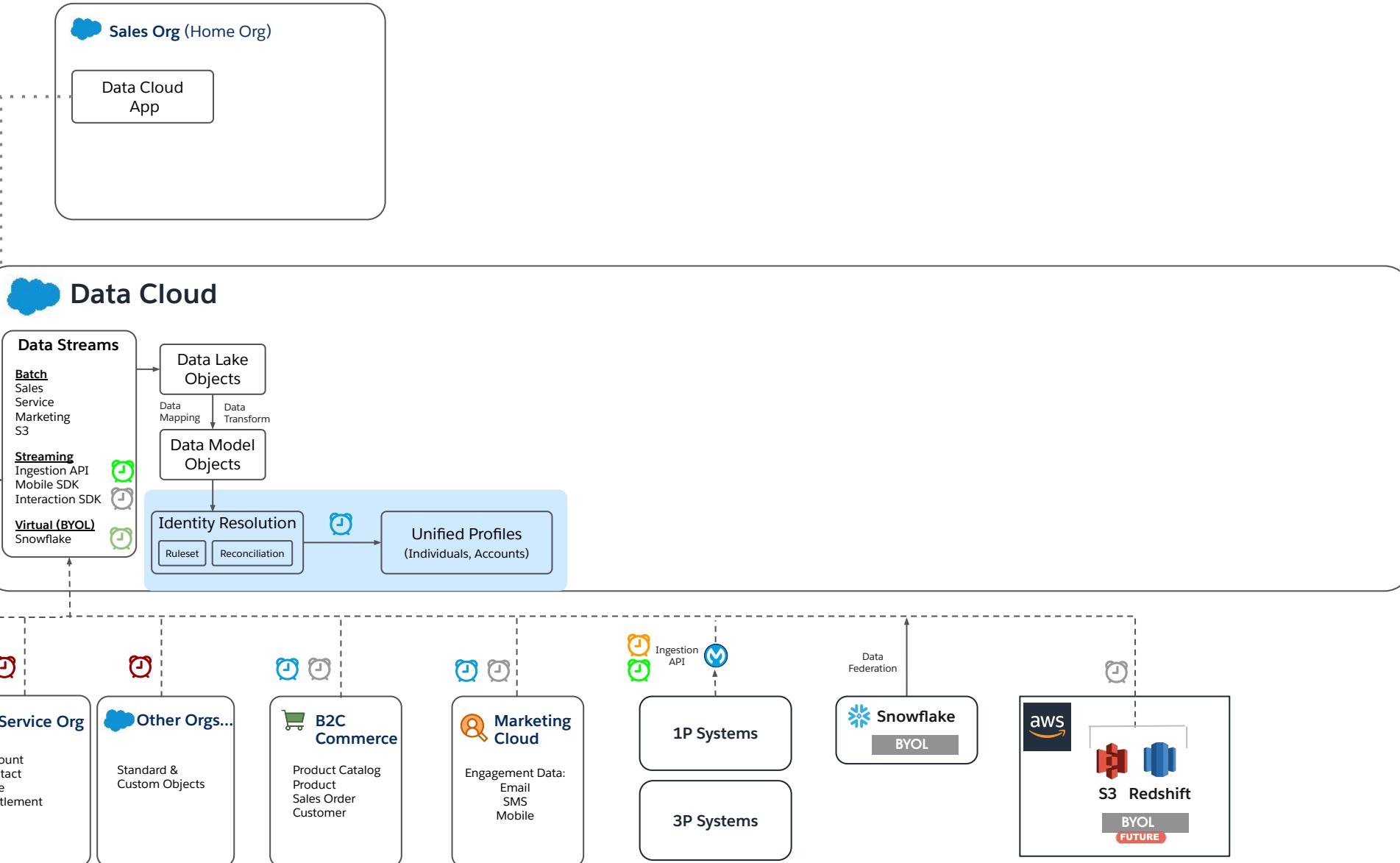
10 mins

Hourly

Daily

Real-Time

Scheduled or Async



# Data Cloud

Calculated Insights

Frequency

Real-time

2 mins

Up to 15 mins

12 hrs

5 mins

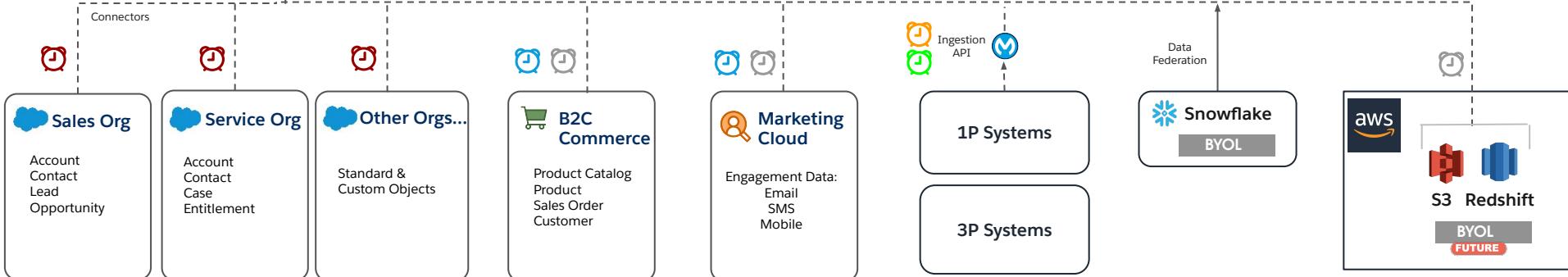
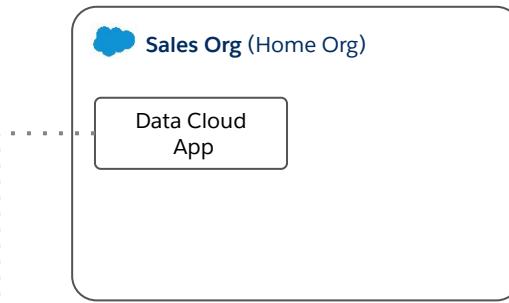
10 mins

Hourly

Daily

Real-Time

Scheduled or Async



# Data Cloud

## Data Actions

Frequency

Real-time

2 mins

Up to 15 mins

12 hrs

5 mins

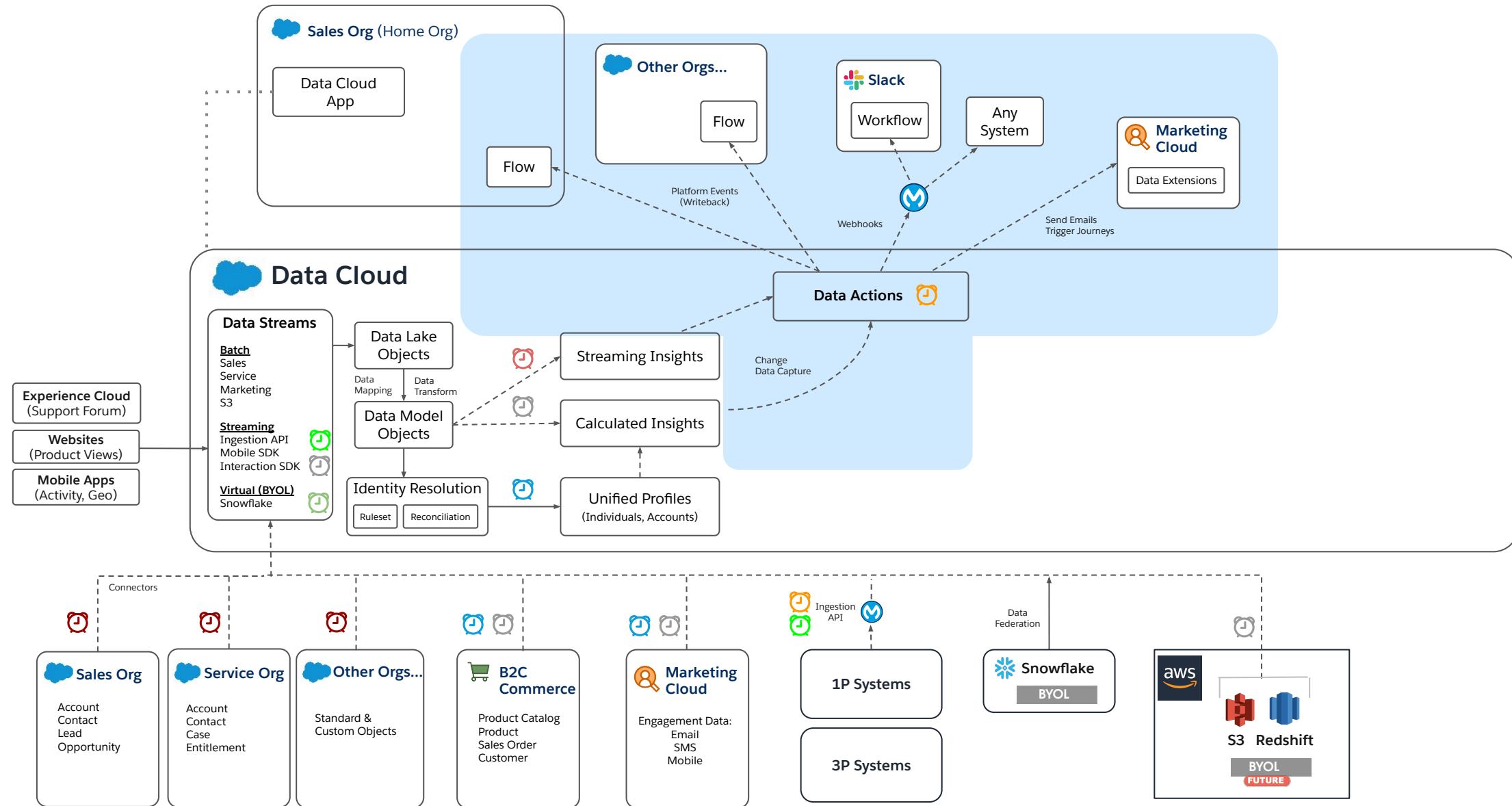
10 mins

Hourly

Daily

Real-Time

Scheduled or Async



# Data Cloud

## CRM Enrichment

Frequency

Real-time

2 mins

Up to 15 mins

12 hrs

5 mins

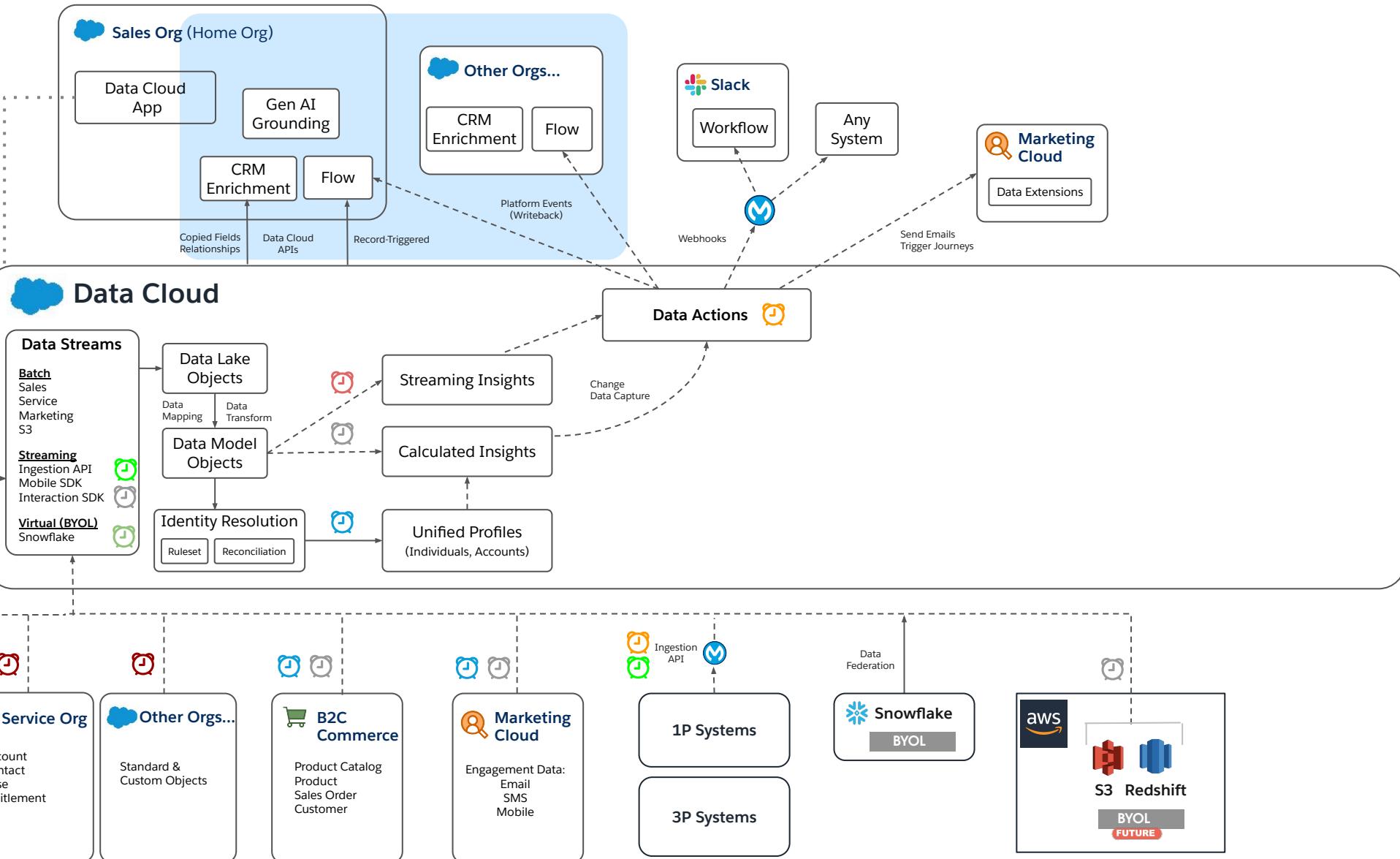
10 mins

Hourly

Daily

Real-Time

Scheduled or Async



# Data Cloud

Train and Run ML Models

Frequency

Real-time

2 mins

Up to 15 mins

12 hrs

5 mins

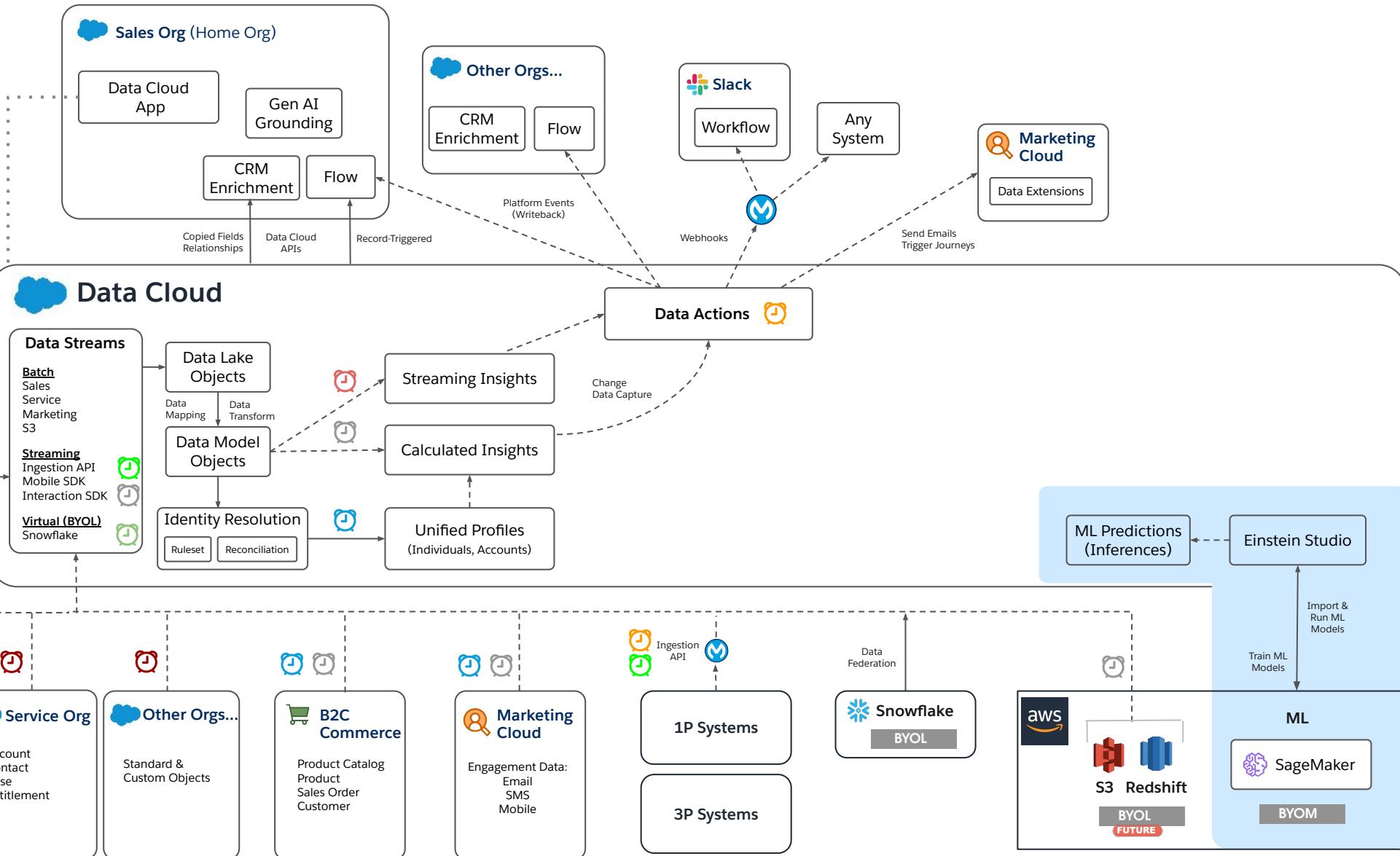
10 mins

Hourly

Daily

Real-Time

Scheduled or Async



# Data Cloud

## Marketing Segmentation and Activation

Frequency

Real-time

2 mins

Up to 15 mins

12 hrs

5 mins

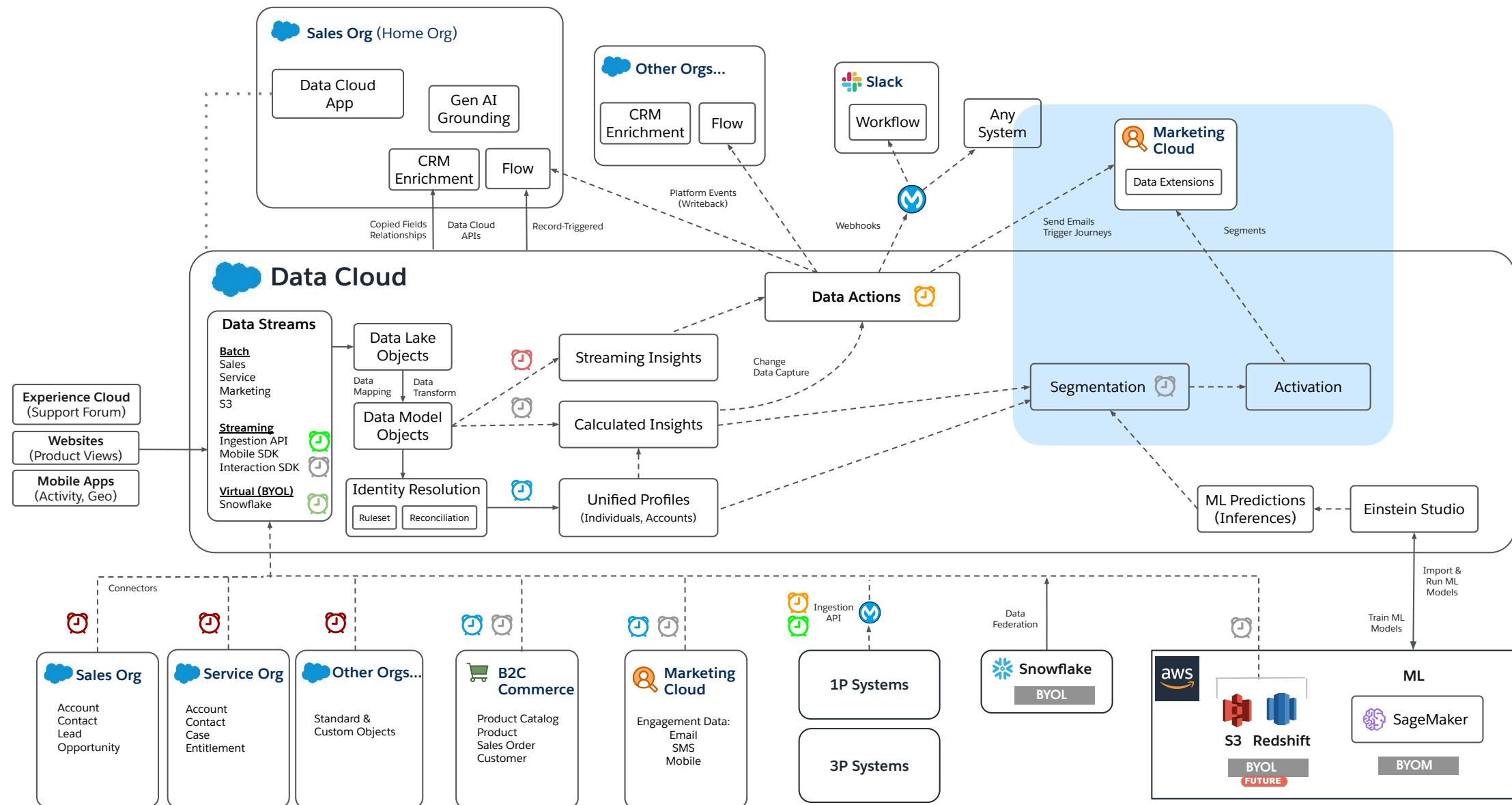
10 mins

Hourly

Daily

Real-Time

Scheduled or Async



# Data Cloud

Marketing Segmentation and Activation (+targets)

Frequency

Real-time

2 mins

Up to 15 mins

12 hrs

5 mins

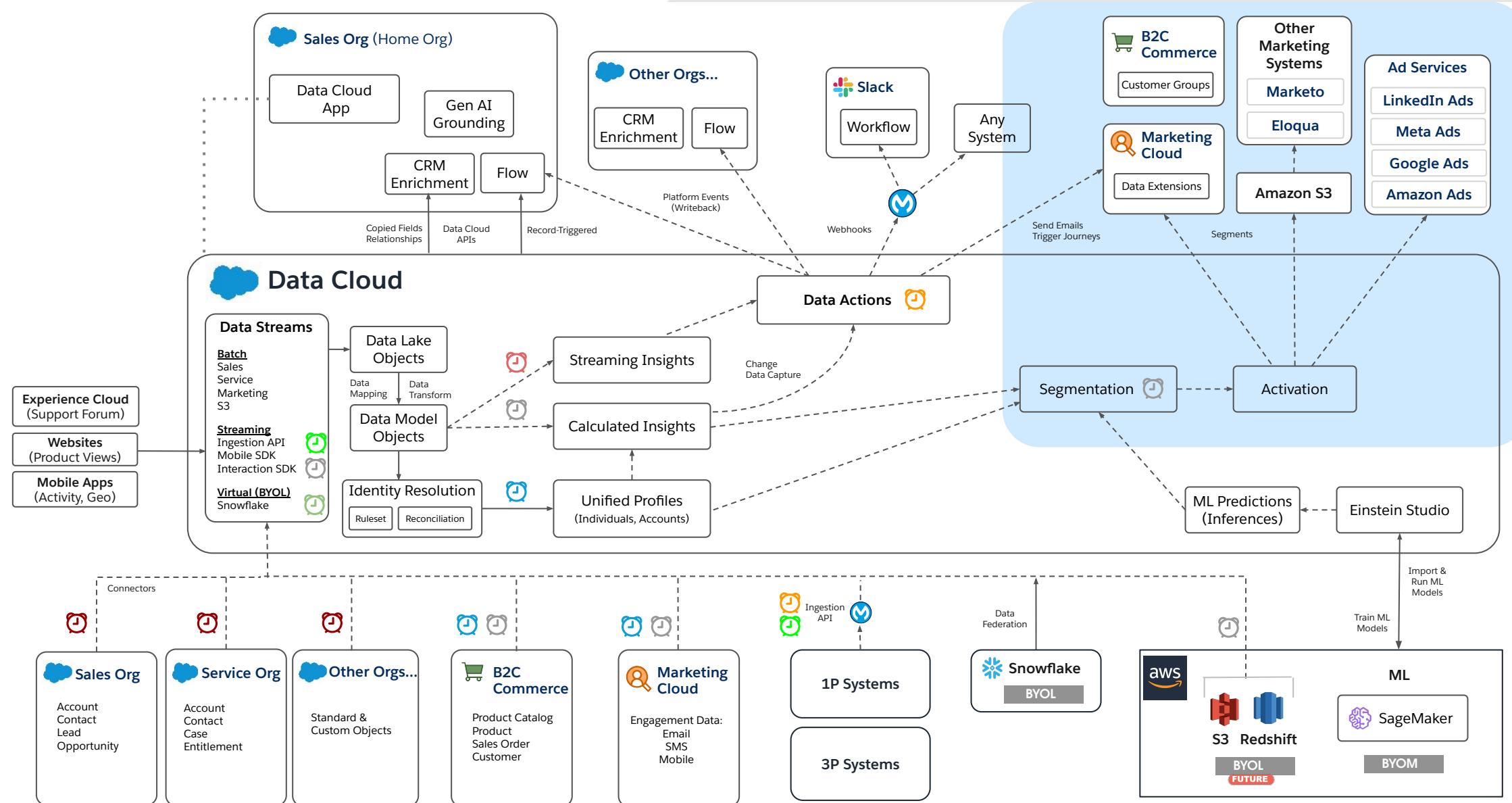
10 mins

Hourly

Daily

Real-Time

Scheduled or Async



# Data Cloud

Analytics and Data Sharing

Frequency

Real-time

2 mins

Up to 15 mins

12 hrs

5 mins

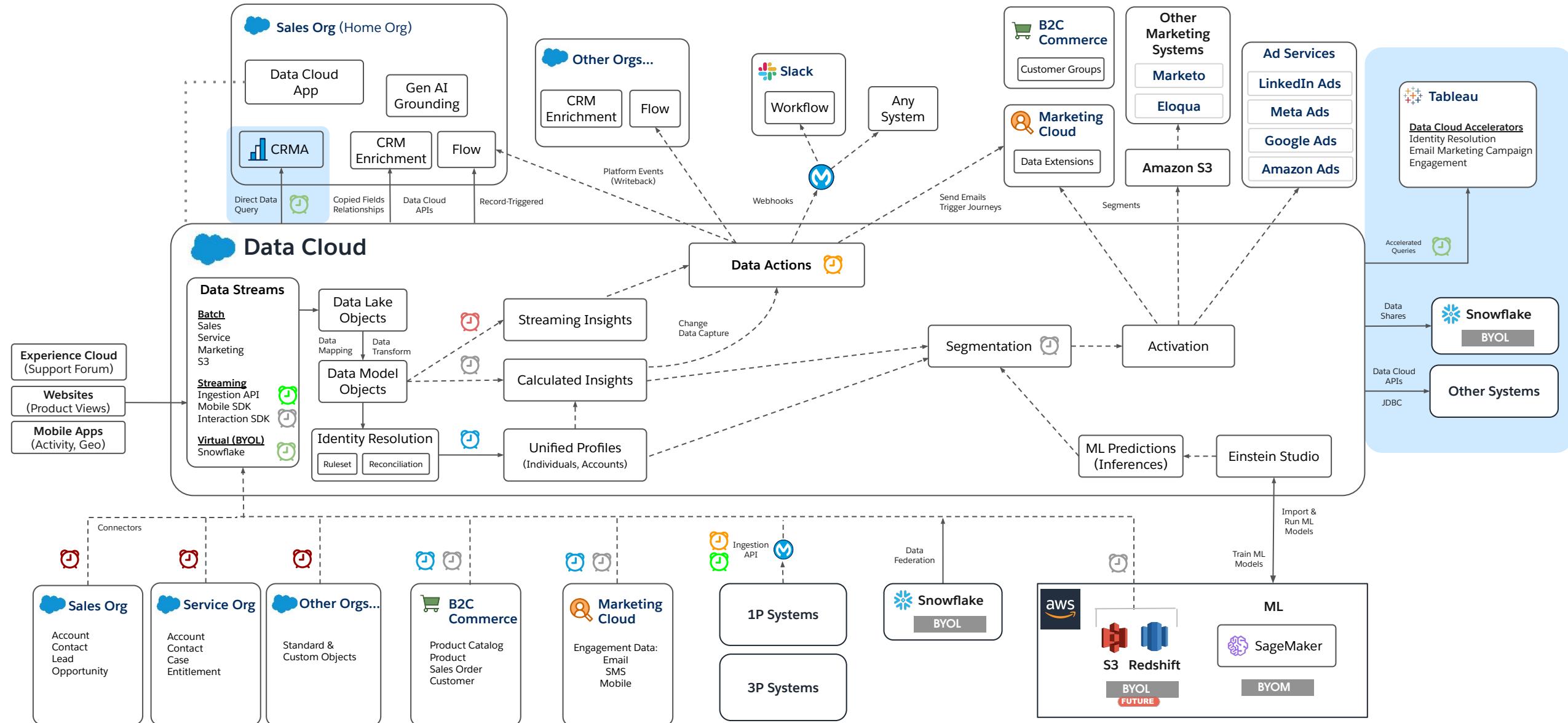
10 mins

Hourly

Daily

Real-Time

Scheduled or Async



# Data Cloud

Vision for an enterprise architecture using Data Cloud

Frequency

Real-time

2 mins

Up to 15 mins

12 hrs

5 mins

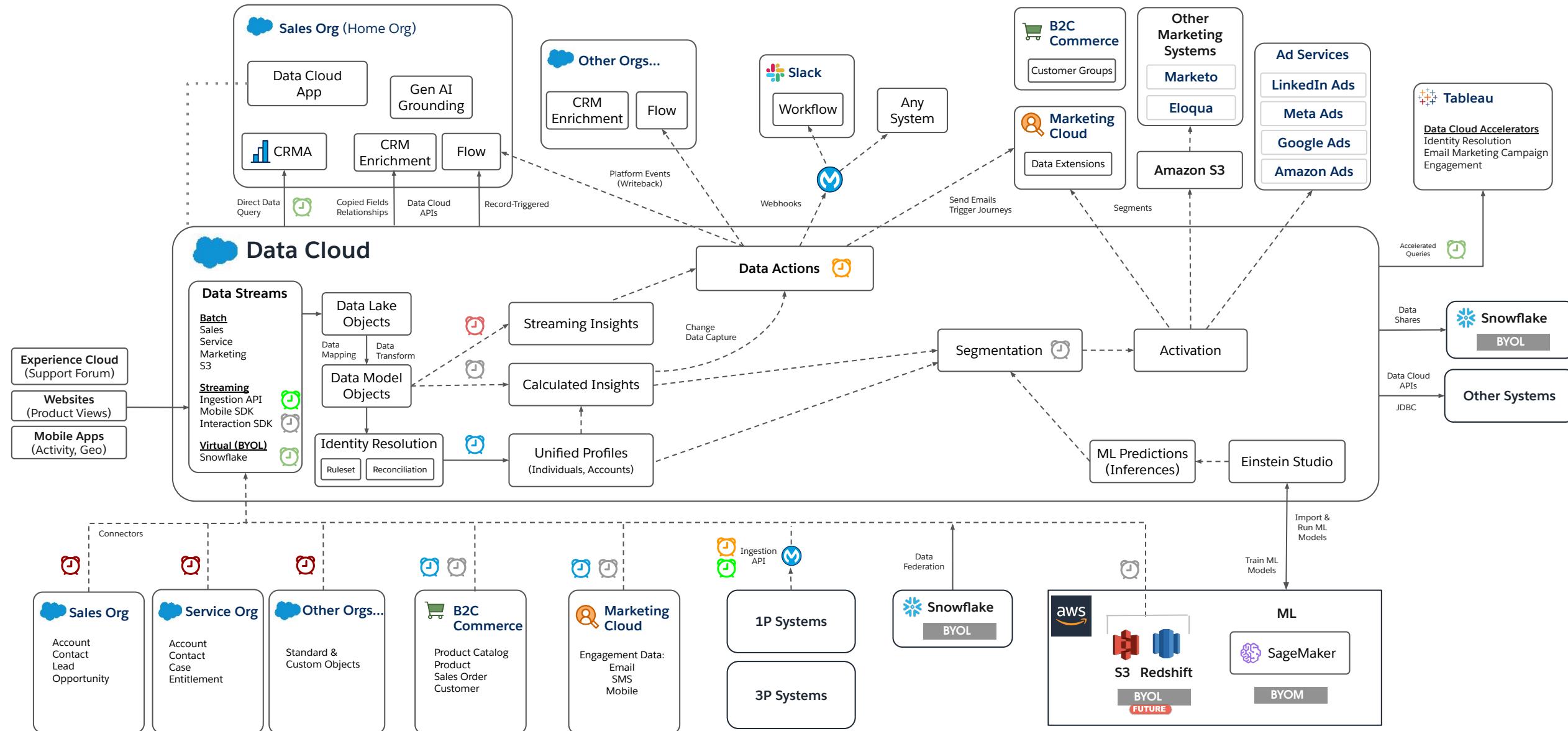
10 mins

Hourly

Daily

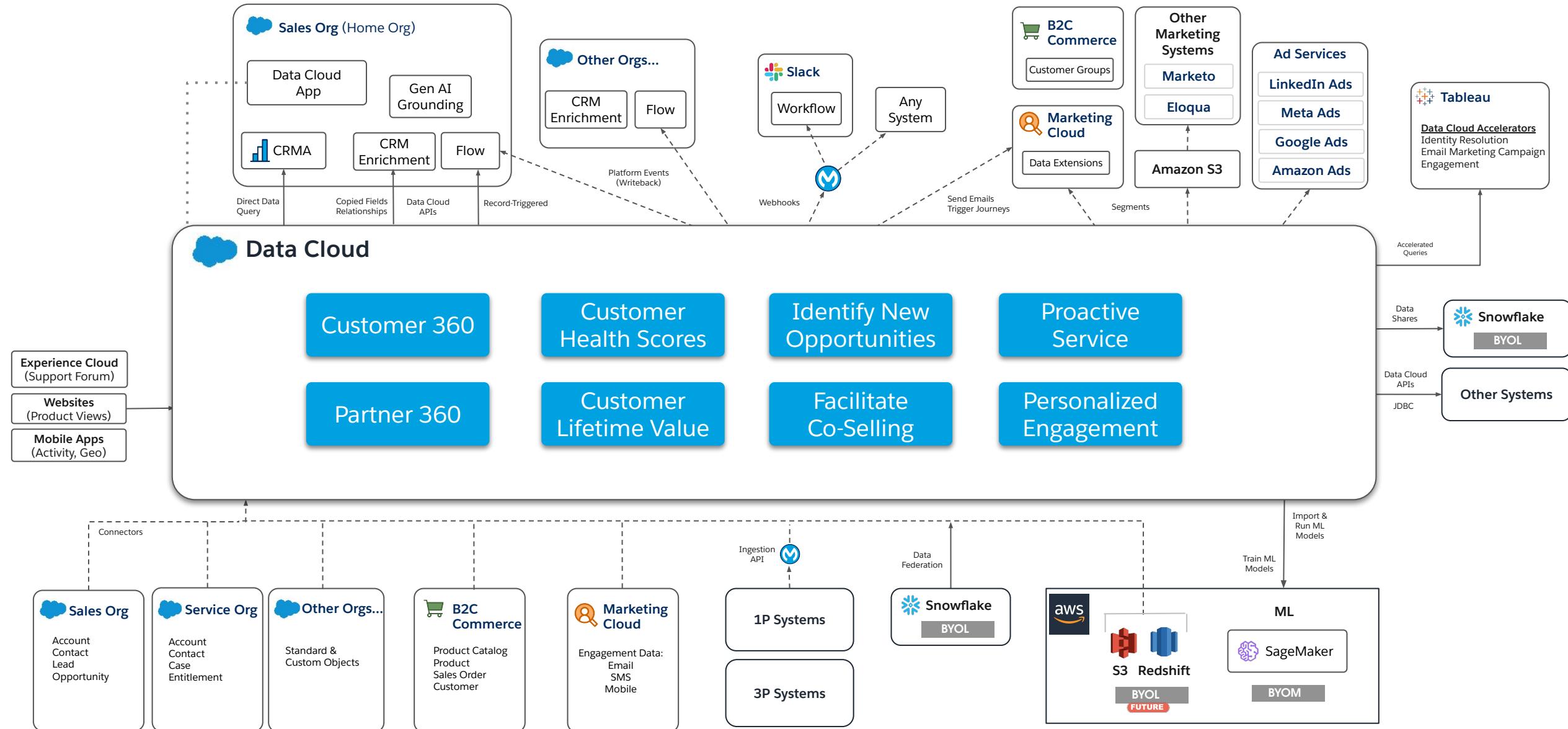
Real-Time

Scheduled or Async



# Data Cloud

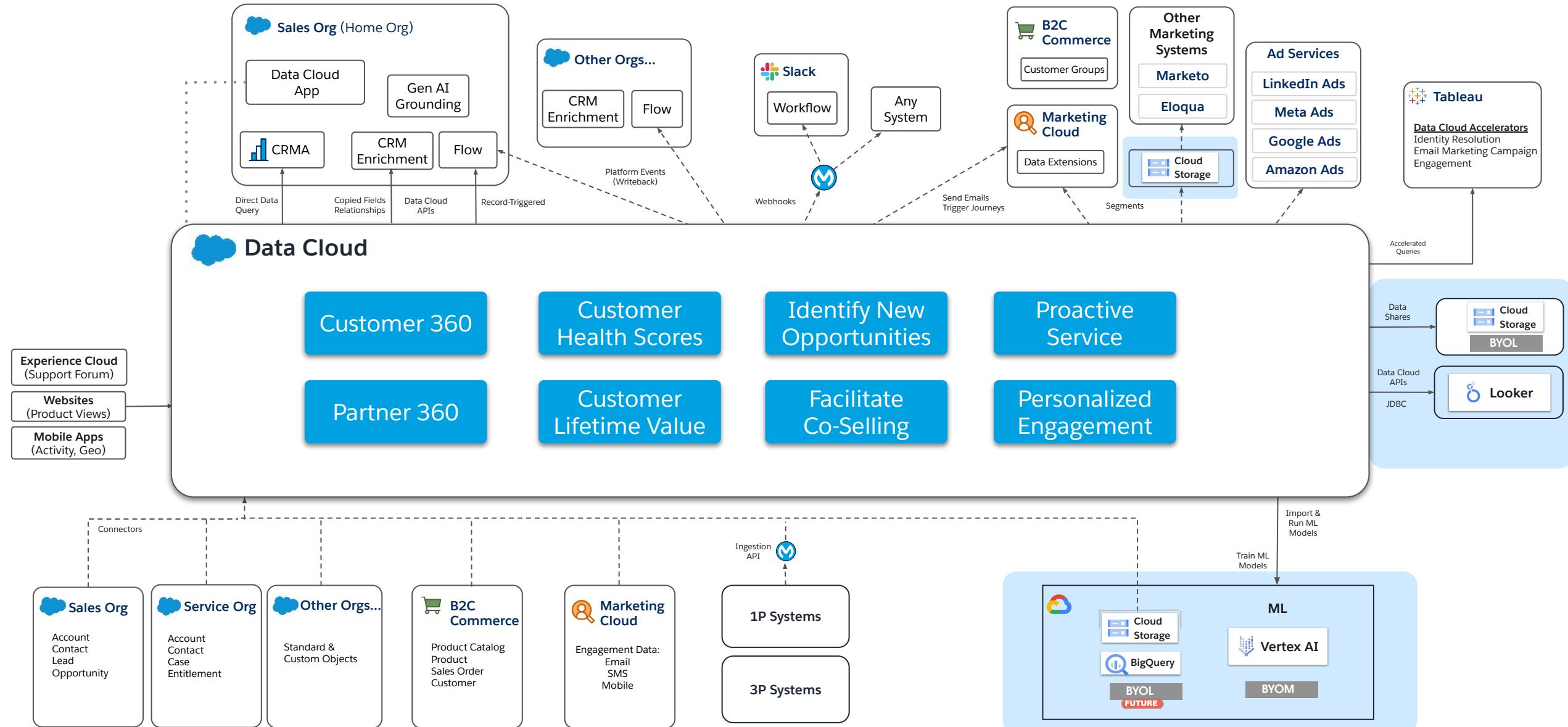
Vision for an enterprise architecture using Data Cloud



# Data Cloud



Vision for an enterprise architecture using Data Cloud + Google

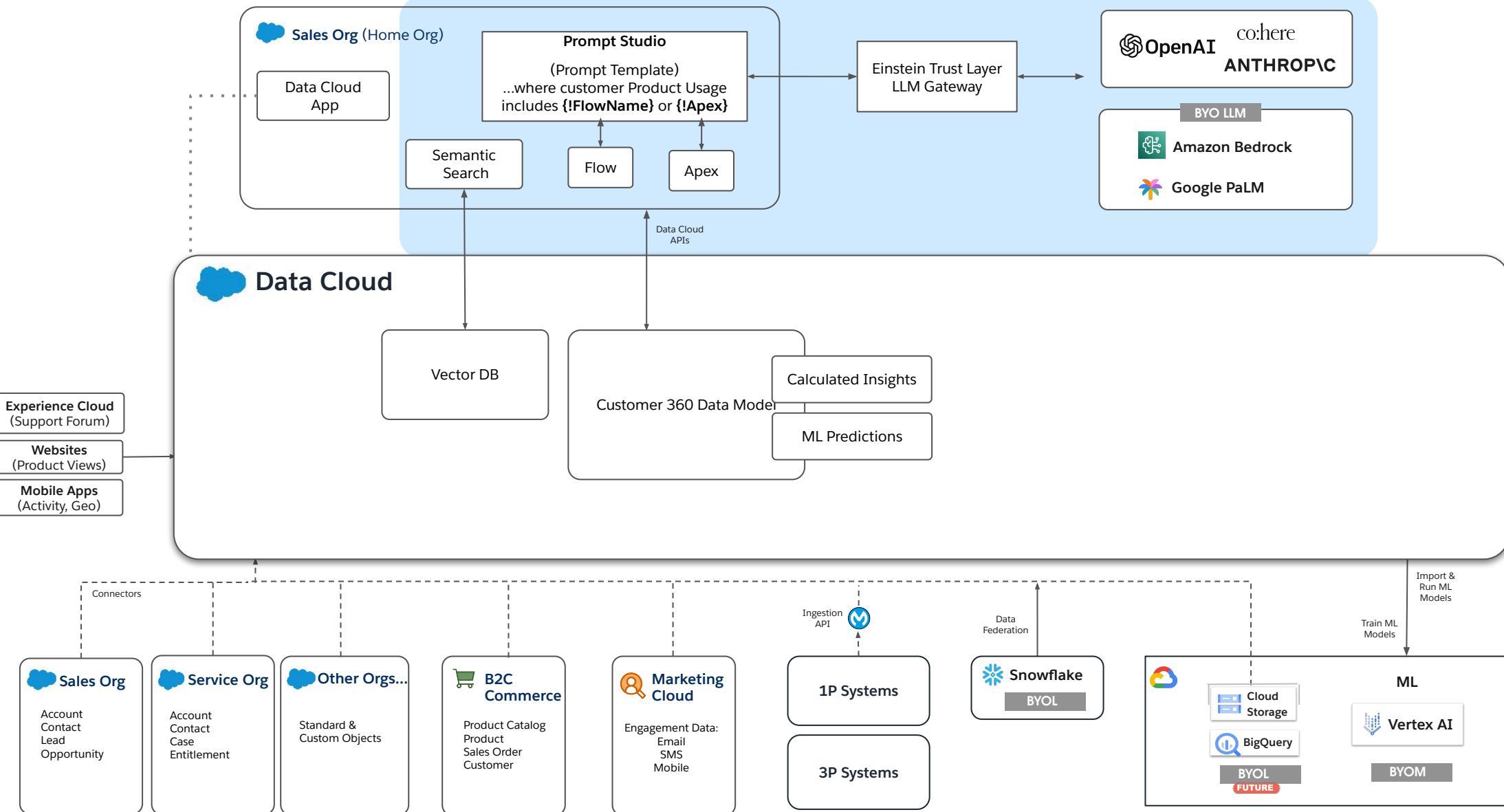


# Data Cloud



Grounding GenAI with Data Cloud data

FUTURE



# CRM Enrichment

Data Cloud activated in CRM





Search...



## Omega, Inc

Oakland, CA

Account ID 02567418

Industry Technology

Type Enterprise

Address 2259 Green Avenue  
Oakland, CA 94611

Current Mo. Spend \$810,486

M.O.M. Change 15% Increase

YTD Spend \$5,842,376

Install Base Storage  
 Compute  
 Security  
 AI

Lifetime Value \$13,114,598

Engagement Score 84%

  
Highly Engaged  
Compared to 10K similar accounts

Powered By

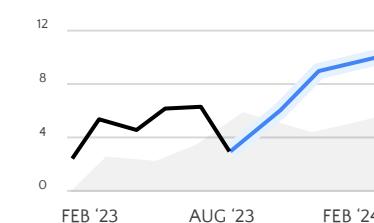


## Revenue Trends by Product



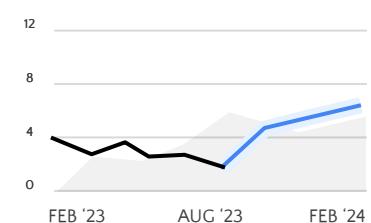
\$3.6M

+6% last 30 days



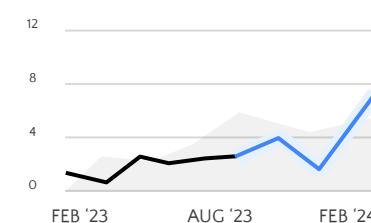
\$2.2M

-2% last 30 days



\$3.3M

+2% last 30 days



Forecast

Actual

Prediction

[View All](#)

## Open Opportunities (5)



Omega - Bedrock

Stage: Pending Close  
Amount: \$124k  
Close Date: 11/04/23

Security Hardening

Stage: Qualification  
Amount: \$468k  
Close Date: 12/07/23

(Partner-Led) Omega DevOps

Stage: Discovery  
Amount: \$1,570k  
Close Date: 12/18/23

Omega - '23 Holiday Ads

Stage: Pending Close  
Amount: \$2,170k  
Close Date: 12/18/23

Omega - '24 Ad Campaigns

Stage: Negotiating  
Amount: \$168k  
Close Date: 11/24/23[View All](#)

## Notification Center

## Amazon Titan Consumption Alert

25% consumption over milestone cap

## Free Tier Conversion

Customer converted from a free tier

## Next Best Offer

## Bedrock Accelerate Series - Campaign

Enroll customer in campaign to pilot how Bedrock can revolutionize their GenAI

[Dismiss](#)[Activate](#)

## Multi-Portfolio Architecture Engagement

Application, Security, AI

[Dismiss](#)[Activate](#)

## Customer Activity

## AWS AppFabric Onboarding

Activation initiated for AppFabric

1 hr ago

## Complete Certification

Solutions Architect Certification

1 hr ago





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\$3.6M

+6% last 30 days



\$2.2M

-2% last 30 days

● Forecast ● Actual ● Prediction

\$3.3M

+2% last 30 days

[View All](#)

## Open Opportunities (5)



Omega - Bedrock

Stage: Pending Close



Security Hardening

Stage: Qualification



(Partner-Led) Omega DevOps

Stage: Discovery

Amount: \$1,570k

Close Date: 12/18/23

CRM Enrichment  
Calculated Insights

Stage: Pending Close

Amount: \$2.170k

Stage: Negotiating

Amount: \$168k

CRM Writeback / Copied Fields  
Calculated Insights Data Copy

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1 hr agoComplete Certification  
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1 hr ago



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Powered By

## Revenue Trends by Product



\$3.6M

+6% last 30 days



\$2.2M

-2% last 30 days



\$3.3M

+2% last 30 days

Forecast Actual Prediction

CRM Enrichment  
Related Lists from Data Cloud objects

## Open Opportunities (5)



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[View All](#)

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Application, Security, AI

[Dismiss](#)[Activate](#)

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1 hr ago Complete Certification  
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1 hr ago



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Oakland, CA 94611**Current Mo. Spend **\$810,486**M.O.M. Change **15% Increase**YTD Spend **\$5,842,376**Install Base
 

- Storage
- Compute
- Security
- AI

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 Highly Engaged  
 Compared to 10K similar accounts

Powered By

## Revenue Trends by Product

**\$3.6M****+6% last 30 days****\$2.2M****-2% last 30 days**

Forecast

Actual

Prediction

**\$3.3M****+2% last 30 days**

## Notification Center


**Amazon Titan Consumption Alert**  
 25% consumption over milestone cap

**Free Tier Conversion**  
 Customer converted from a free tier

## Data Action

Receive Events (Data Actions) from Data Cloud

Bedrock can revolutionize their GEA

**Dismiss****Activate**

## Multi-Portfolio Architecture Engagement

Application, Security, AI

**Dismiss****Activate**

## Customer Activity


**AWS AppFabric Onboarding**  
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 1 hr ago

**Complete Certification**  
 Solutions Architect Certification  
 1 hr ago
**View All**

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Stage: Negotiating

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**View All**



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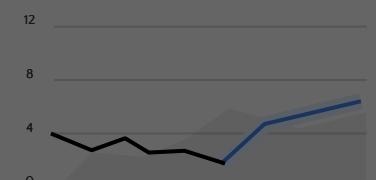
\$3.6M

+6% last 30 days



\$2.2M

-2% last 30 days



Forecast

Actual

Prediction



\$3.3M

+2% last 30 days



**Offer Propensity Insight**  
Einstein Studio BYOM (SageMaker, Vertex AI)

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View All

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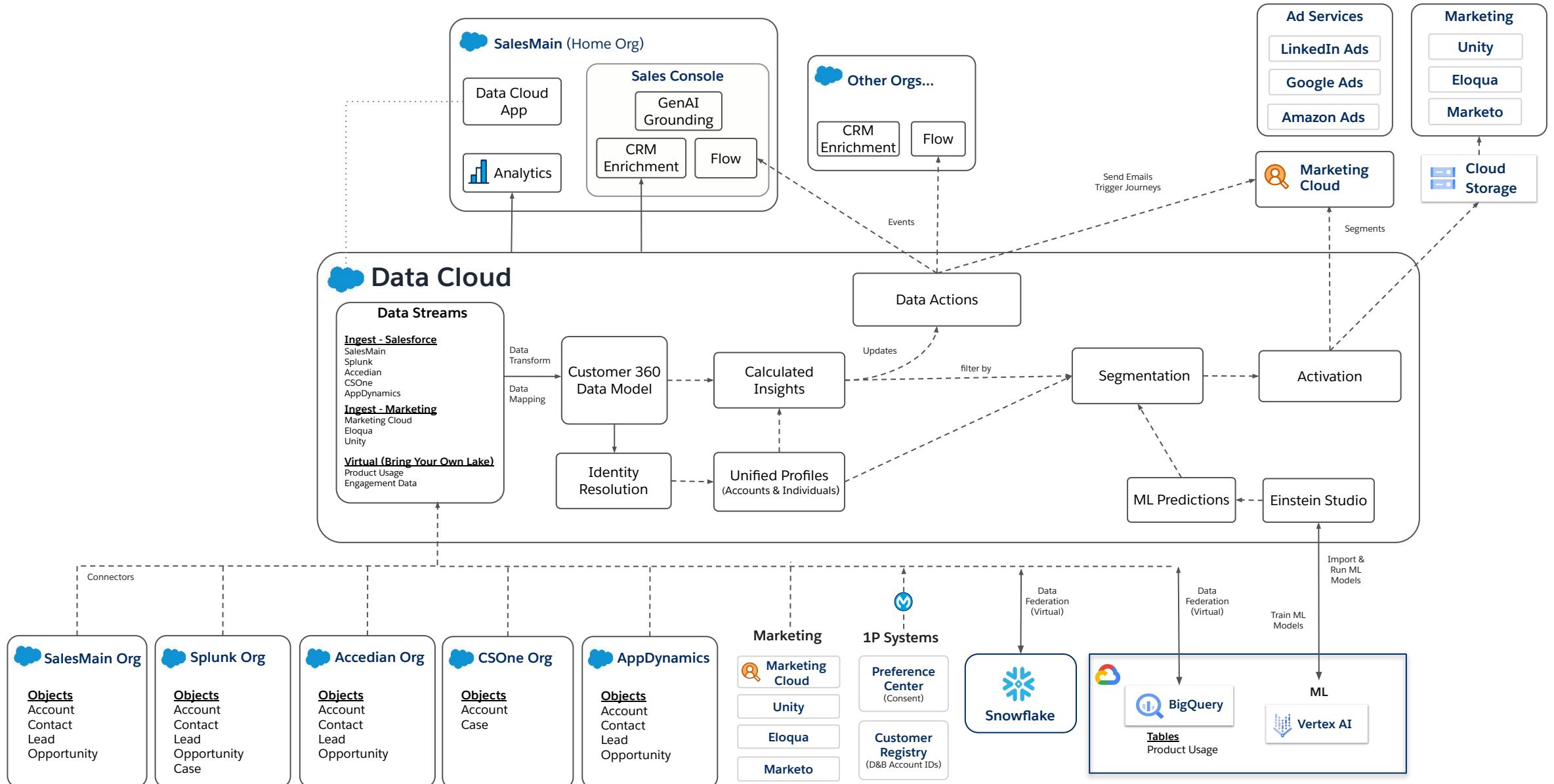
Complete Certification  
Solutions Architect Certification  
1 hr ago

A stylized illustration of a desert landscape at dusk or dawn. The sky is a gradient from light blue to orange, dotted with small white stars. In the distance, there are several low, rounded hills. In the foreground, there are several desert plants: two large saguaro cacti on the left, one smaller cactus in the center, and two agave plants on the right. The ground is a light brown color.

**Demo**

# Data Cloud

## Demo Architecture



# Data Cloud Resources

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## Data Cloud

- [Discover Data Cloud Demo \(1 min\)](#)
- [Demo by Data Cloud product lead \(MK\)](#)
- [Data Cloud \(product page\)](#)
- [Data Cloud documentation](#)
- [Data Cloud Video Library & Trailhead Modules](#)
- [Data Cloud Feature Release Hub](#)
- [Data Cloud Technical Capabilities Explained](#)
- [Bring All Your Customer Data Together in Data Cloud](#)

## Strategic Partnerships

- [Salesforce and AWS Expand Partnership \(Nov 2023\)](#)
- [Bring Your Google Vertex AI Models to Data Cloud](#)
- [Elevate Your AI Strategy with Google Vertex AI and Salesforce Data Cloud \(webinar\)](#)

## Data Cloud for Marketing

- [Data Cloud for Marketing \(product page\)](#)
- [Data Cloud for Marketing Use Case eBook](#)

## Data Cloud for Tableau

- [Data Cloud Data in Tableau](#)
- [Data Cloud for Tableau \(product page\)](#)
- [What is Salesforce Data Cloud for Tableau](#)
- [Faster Analytics with Hyper Query Engine](#)

## MuleSoft & Data Cloud

- [Connect any data with MuleSoft and Data Cloud \(video\)](#)
- [How MuleSoft Adds Value to Data Cloud](#)
- [MuleSoft Salesforce Data Cloud Connector](#)

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# Thank You



## image generator

❗ Error creating image

I apologize for the inconvenience, but it seems that the request still doesn't align with our content policy. While I can create an image inspired by superhero themes, I need to ensure that it does not closely resemble any specific copyrighted characters or symbols.

If you're open to it, I could create an image of a generic superhero character, standing on a building and looking out over a futuristic city, with a fictional and unique symbol in the sky that doesn't reference any known logos or characters. Would you like to proceed with this adjusted concept?



## You

yes that's fine, but can you please make the signal in the sky look like a purple rabbit with a genie wand?

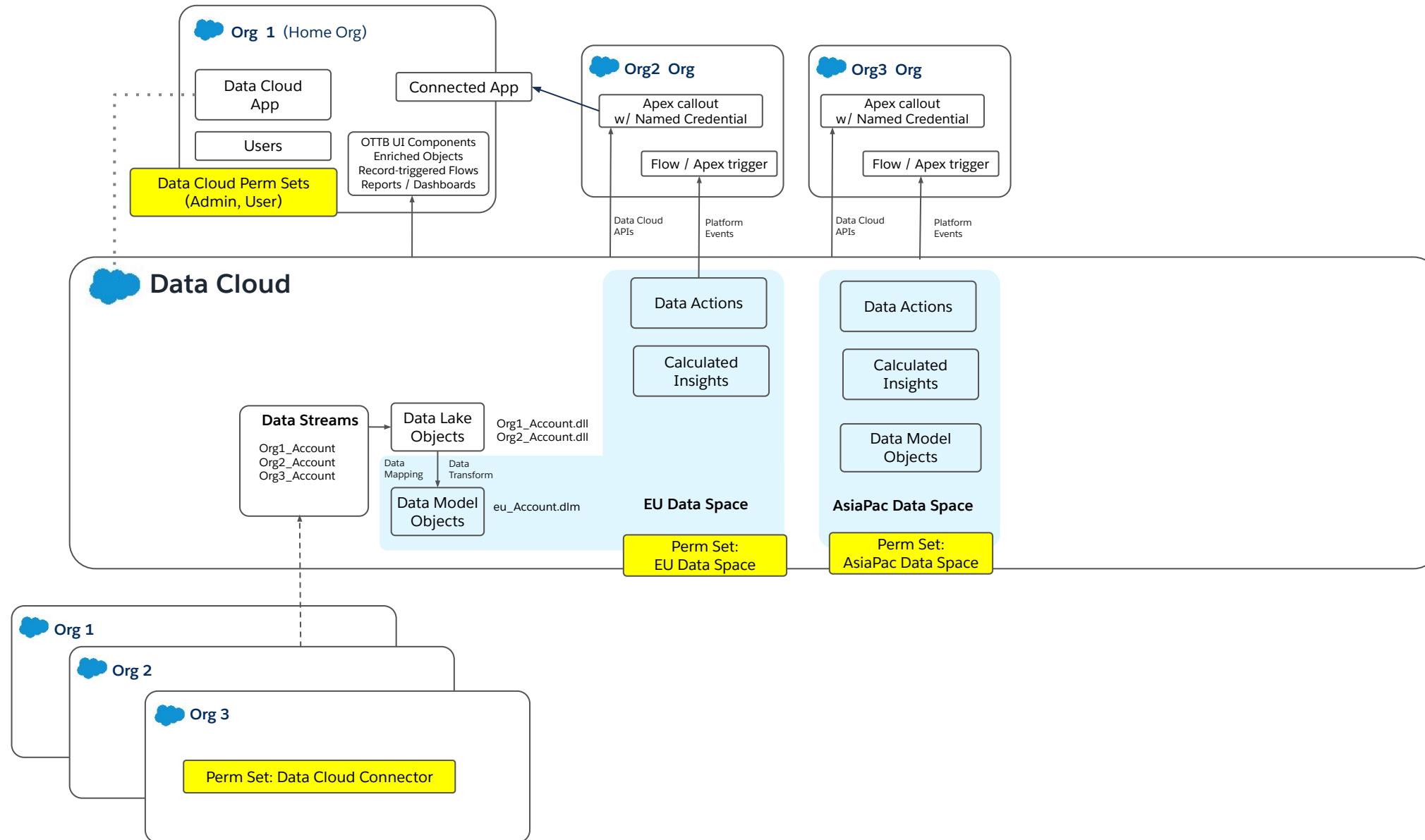


# Appendix



# Data Cloud

Security and Data Spaces



A stylized illustration of a desert landscape at dusk or dawn. The foreground is sandy with several green cacti and agave plants. In the middle ground, rolling sand dunes are visible. The sky is a gradient from light blue to orange, dotted with numerous small white stars and silhouettes of birds flying.

# Demo Screenshots



Sales - Console

Contacts

Lauren Bailey | Cont...

Q Search...



Lauren Bailey 3rd

Director of Sales

I am a driven entrepreneur striving to utilize my passions to make an impact. My skills include business communications, operations management and su...see more

Dallas-Fort Worth Metroplex  
1473 connections

**Current**  
Director of Sales at Broker Online Exchange  
4 yrs 1 mo

**Previously**  
Account Manager at Broker Online Exchange

**Education**  
University of Arkansas at Fayetteville • 2010–2016

Save in Sales Navigator

Not the right person? Matched ⓘ

Omega, Inc.

Phone  
(415) 555-

## Calculated Insights

## Contact Engagement Metrics

Engagement Score	85%
Lead Quality Score	A+
Monthly Communication Interaction Frequency	5
Active Opportunities	3

## Sales Engagements

Last engaged:

Engagements within 30 days:

## Einstein Action Plan

Add to SD-WAN to Splunk Growth Sprint Cadence  
Target customer based on usage

I'm Ready! No Thanks

Send Personalized Splunk Connect  
Invite Lauren to relevant Splunk events based on current engagement

Let's Go! No Thanks

Add to 2024 Key Sales Targets  
Let marketing know the top 3 sales products

I'm Ready! No Thanks

## Leads &amp; Account Contacts across Salesforce orgs

## Related Leads (3)

Organization	Campaign	Stage	Date Created
Cisco Meraki	Meraki New Product Launch	Working	7/5/2022
Accedian	Accedian Customer Nurture Email	Converted	6/5/2023
Splunk	Splunk ABM Campaign Q1 2024	New	12/19/2023

View All

## Cross-Org Sales Teams (3)

Organization	Seller	Role	Activity Count (Weekly)
Cisco Meraki	Harper Bradley	Account Manager	0
Accedian	Grace Hooper	Specialist	1
Splunk	Mohammad Aziz	Account Manager	6

View All

## Opportunities (3)

3 items • Updated 28 minutes ago

Opportunity Name	Stage	USD	Date
WebEx - Collaboration Bundle	Closed Won	41,860.00	11/4/2023
Omega, Inc. - SD-WAN Services - 40K	Discovery	40,000.00	6/7/2023
Accedian - Renewal - 300k	Discovery	40,000.00	6/7/2023

View All

## Engagement data from Data Cloud

## Product Usage from Big Query BYOL

## Install Base

ID: 5429091

## Networking

## Security

## Collaboration

## Computing

## Full-Stack Observability

View Asset Details

## Interaction History

## SD-WAN Customer Support Call

6 hours ago

## Service

Case Subject: Error DS-01  
Case Status: Working

## Splunk Email Engagement

Marketing  
Splunk Marketing Email: Test These Splunk Features  
Email Status: Opened

## Accedian In App Purchase

Commerce  
In App Purchase: SaaS Visibility Add On +20 Licenses  
Order Status: Provisioned

## Splunk New Trial Activation

CDP  
Splunk Trial: Created New 30 Day  
Trial Status: Active

## Splunk.com Web Engagement

15 days ago



Sales

Home Campaigns Chatter Accounts Contacts Leads Opportunities Dashboards Reports

Search...

Account  
**Omega, Inc.**Account Owner  
Vince WestAccount Number  
A43836686Parent Account  
AmpTech CorporationService Tier  
PlatinumIndustry  
TechnologyWebsite  
www.omegainscorporated.com

Create Summary Edit View Account Hierarchy

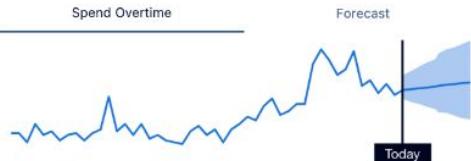
Data updated: Jan 3, 2024 at 2:26 PM



## Annual Spend

\$78M

Customer since 2008



## Open Pipeline w/ Close Date Next 90 Days

\$3.5M

This quarter, new pipeline is up 5% (\$2.2M) relative to last quarter.

	Propensity to Buy	Opportunities
Splunk	0.73	
Cisco Catalyst	0.55	
WebEx Services	0.45	
Cisco Fabric	0.37	
	0.18	

## Engagement Score

85

↑ 15% Monthly

Account contacts have shown an increase in engagement with Cisco's digital content focused on Splunk, suggesting a high probability of additional product purchases in the upcoming 90 days.

	Support Cases	Account Activities
Total	Sentiment (1-10)	SLA Missed
17	7	5
New	4	
Waiting on Customer	1	
Working	6	

## Alerts (3)

⚠️ Upcoming SD-WAN Renewal

⚠️ WebEx Enterprise

&gt; ⓘ Splunk New Trial

**Calculated Insight  
over Opportunities across orgs****Total FY24 ACV Closed  
\$9,277,215**

## Purchase Likelihood Score for Splunk



73

TOTAL SCORE

## LEADING CAUSES

- +50 Engagement with Splunk Content: Visited landing page, signed up for a free trial
- +25 Upcoming SD-WAN renewal
- +20 Currently using basic data analysis tools
- 17 Splunk Specialist Engagement is FALSE

Cases Opportunities Product Usage Details Sales Navigator

## Opportunities (10+)

10+ items · Sorted by Close Date · Updated 3 hours ago

Opportunity Name	Amount	Stage	Close Date	Type
SD WAN Renewal FY24	USD 2,549,360.00	Negotiation	1/10/2024	Add-On Business



Sales

Home

Campaigns

Chatter

Accounts

Contacts

Leads

Opportunities

Dashboards

Reports

Search...

Account  
Omega, Inc.

## Opportunities From Other Sales Orgs (5)

Enter search term ...

Name	Amount	Stage	Type	Close Date	Source Org
Accedian - Services	\$70,000	Negotiation	Services	01/04/2024	Accedian
Accedian -- License Upsell	\$461,646	Negotiation	New Business	01/04/2024	Accedian
Accedian -- Trial Conversion	\$11,445	Qualification	Services	01/04/2024	Accedian
Omega Splunk - Renewal Opportunity	\$61,080	Negotiation		10/17/2023	Splunk
Splunk - Disaster Recovery Add-On	\$72,670	Qualification		10/14/2023	Splunk

Refresh



Sales

Home

Campaigns

Chatter

Accounts

Contacts

Leads

Opportunities

Dashboards

Reports

 Search... Account  
**Omega, Inc.**

8	<a href="#">00001164</a>	Can I access your community from my mobile device?	James Wu	Working	Low	Jay Service	
9	<a href="#">00001162</a>	How do I create a secure password?	Mark Kingston	Working	Medium	Linda Service	
10	<a href="#">00001159</a>	What are your service hours?	Lauren Bailey	Closed	Medium	Steven Service	

[View All](#)

## All Account Cases (12)

Case Number	Status	Priority	Last Modified	Subject	Source Org
00010344	New	Medium	01/05/2024 3:58PM PST	AJC Corporation - investor request	Splunk
00001437	Closed	Medium	01/05/2024 3:10AM PST	Product upgrade suggestion	CSOne
00002373	New	Critical	01/05/2024 3:10AM PST	Issues integrating with our private cl...	CSOne
00010274	Waiting on Customer	Medium	01/05/2024 3:10AM PST	Question about usage for last month	CSOne
00001615	Working	Low	01/05/2024 3:10AM PST	Is your platform GDPR compliant?	CSOne
00010285	New	Medium	01/05/2024 3:10AM PST	ETL and integration strategy for Sno...	CSOne
00001530	Working	High	01/05/2024 3:10AM PST	How do I set up SSO with our custo...	CSOne
00001493	Working	Low	01/05/2024 3:10AM PST	Tickets to your upcoming annual co...	CSOne
00001191	Closed	Low	01/05/2024 3:10AM PST	Update contract terms to semi-annual	CSOne
00001456	Working	Medium	01/05/2024 3:10AM PST	Where do I get your mobile app?	CSOne
00001493	Waiting on Customer	Low	01/04/2024 7:03PM PST	Can I access your community from ...	Splunk
00001530	Escalated	Medium	01/04/2024 7:03PM PST	How do I create a secure password?	Splunk

[Refresh](#)



Sales - Console

Contacts

Lauren Bailey | Cont...

Search...



Lauren Bailey | ...

Omega, I...

Today

## Product Usage Calculated Insights over Big Query BYOL data

Waiting on Customer

Working

6

[Cases](#)   [Opportunities](#)   [Product Usage](#)   [Details](#)   [Sales Navigator](#)

### Total Product Usage

Product Name	Total Usage
Cisco SD-WAN Fabric	2,288
Cisco Nexus Dashboard	178,652
Webex Enterprise	22,308
Cisco Catalyst 9200 Switches Monitoring	52

### Product Usage

Product Name	Usage Metric	Total	Avg	Max	Min	Months
Cisco SD-WAN Fabric	Utilization Score	4,576	74	155	13	62
Cisco Nexus Dashboard	API Calls	159,032	2,093	5,040	330	76
Cisco Nexus Dashboard	Security Profiles	25,328	317	1,050	30	80
Cisco Nexus Dashboard	Workflows	29,430	409	1,050	30	72
Cisco Nexus Dashboard	Utilization Score	140,924	1,957	2,520	990	72
Webex Enterprise	Active Users	44,616	11,154	11,654	10,654	4
Cisco Nexus Dashboard	Active Users	2,590	65	149	13	40
Cisco Catalyst 9200 Switches ...	Active Users	104	13	13	13	8

Acct Product Usage

Modified



C

Data updated: Today at 6:14 AM



2.3k

Total API Calls

45

Total Security Profiles

774

Total Workflows

76%

Avg Util. Score

### Product Landscape


Cisco SD-WAN Fabric
Cisco Nexus Dashboard
WebEx Enterprise

API Calls

YoY

23.05%

Utilization Score

YoY

-12.41%



400

API Calls

2.4k

100

Target: 95%

Utilization Score

Utilization Score

73

TOTAL SCORE

### LEADING CAUSES

+50	Engagement with Splunk Content: Visited landing page, signed up for a free trial
+25	Upcoming SD-WAN renewal
+20	Currently using basic data analysis tools
-17	Splunk Specialist Engagement is FALSE
-5	Recent missed SLAs

### HOW TO IMPROVE THIS

+17	Set Splunk Specialist engagement to TRUE
+10	Set Executive outreach to TRUE

### Next Best Action



**Splunk Target Account -- Add to Campaign**  
Recommending target account based on Splunk Propensity to Buy

No Thanks

**Engage Splunk Expert**  
To improve the Splunk Propensity to Buy, engage a Splunk expert

No Thanks

**WebEx Get Well Plan**  
Engage WebEx Customer Success to address declining utilization

Not Now

### Activity

# Data Streams

The screenshot shows the Salesforce Data Cloud interface with the 'Data Streams' tab selected. It displays three distinct sections, each listing data streams for a specific object type.

**1. Data Streams - CRM Accounts**

4 items • Sorted by Data Stream Name • Filtered by All data streams - Data Stream Name, Data Connector Type • Updated 32 minutes ago

	<input type="checkbox"/> Data Stream Name ↑	Data Connector Type	Stream Type	Last Run Status	Data Stream Status	Last Refreshed	Total Records	Last Processed Records
1	<input type="checkbox"/> AccedianOrgAccount_00DHn000002UT3J	Salesforce CRM	Ingest	Success	Active	1/4/2024, 6:48 PM	593	594
2	<input type="checkbox"/> CiscoCSOneOrgAccount_00DHs000003UtOo	Salesforce CRM	Ingest	Success	Active	1/4/2024, 4:53 PM	593	594
3	<input type="checkbox"/> HomeOrgAccount_00DHs000002k4Qc	Salesforce CRM	Ingest	Success	Active	1/8/2024, 9:43 AM	148	3
4	<input type="checkbox"/> SplunkOrgAccount_00DHs000001yyZX	Salesforce CRM	Ingest	Success	Active	1/8/2024, 7:33 AM	594	595

**2. Data Streams - CRM Opportunities**

3 items • Sorted by Data Stream Name • Filtered by All data streams - Data Stream Name, Data Connector Type • Updated a few seconds ago

	<input type="checkbox"/> Data Stream Name ↑	Data Connec...	Stream T...	Last Run Status	Data Stre...	Last Refreshed	Total Records	Last Processed Records
1	<input type="checkbox"/> AccedianOrgOpportunity_00DHn000002UT3J	Salesforce CRM	Ingest	Success	Active	1/4/2024, 7:58 PM	10,663	10,664
2	<input type="checkbox"/> HomeOrgOpportunity_00DHs000002k4Qc	Salesforce CRM	Ingest	Success	Active	1/8/2024, 9:33 AM	5,816	1
3	<input type="checkbox"/> SplunkOrgOpportunity_00DHs000001yyZX	Salesforce CRM	Ingest	Success	Active	1/5/2024, 1:33 PM	5,541	1

**3. Data Streams - CRM Contacts & Leads**

7 items • Sorted by Data Stream Name • Filtered by All data streams - Data Stream Name, Data Connector Type • Updated a few seconds ago

	<input type="checkbox"/> Data Stream Name ↑	Data Connector T...	Stream Type	Last Run Status	Data Stream Status	Last Refreshed	Total Records	Last Processed Records
1	<input type="checkbox"/> AccedianOrgContact_00DHn000002UT3J	Salesforce CRM	Ingest	Success	Active	1/4/2024, 2:43 PM	640	641
2	<input type="checkbox"/> AccedianOrgLead_00DHn000002UT3J	Salesforce CRM	Ingest	Success	Active	1/4/2024, 2:03 PM	1,594	1,595
3	<input type="checkbox"/> CiscoCSOneOrgContact_00DHs000003UtOo	Salesforce CRM	Ingest	Success	Active	1/4/2024, 4:48 PM	640	641
4	<input type="checkbox"/> HomeOrgContact_00DHs000002k4Qc	Salesforce CRM	Ingest	Success	Active	1/8/2024, 9:43 AM	195	3
5	<input type="checkbox"/> HomeOrgLead_00DHs000002k4Qc	Salesforce CRM	Ingest	Success	Active	1/5/2024, 1:33 PM	375	1
6	<input type="checkbox"/> SplunkOrgContact_00DHs000001yyZX	Salesforce CRM	Ingest	Success	Active	1/6/2024, 1:13 AM	641	642
7	<input type="checkbox"/> SplunkOrgLead_00DHs000001yyZX	Salesforce CRM	Ingest	Success	Active	1/5/2024, 1:33 PM	1,594	1

# Data Streams

Data Streams  
**4. Data Streams - Product Usage**  

1 item • Sorted by Data Stream Name • Filtered by All data streams - Data Stream Name, Data Connector Type • Updated a few seconds ago

New Delete Data Stream Update Status

Search this list...      

	<input type="checkbox"/> Data Stream Name ↑	<input type="checkbox"/> Data Connector Type	<input type="checkbox"/> Stream Type	<input type="checkbox"/> Data Stream Status	
1	<input type="checkbox"/> BigQuery Product Usage	Google Big Query	Direct Access	Active	

Data Streams  
**5. Data Streams - Marketing**  

24 items • Sorted by Data Stream Name • Filtered by All data streams - Data Stream Name, Data Connector Type • Updated a few seconds ago

New Delete Data Stream Update Status

Search this list...      

	<input type="checkbox"/> Data Stream Name ↑	<input type="checkbox"/> Data Connector Type	<input type="checkbox"/> Stream Type	<input type="checkbox"/> Last Run Stat...	<input type="checkbox"/> Data Strea...	<input type="checkbox"/> Last Refreshed	<input type="checkbox"/> Total Records	<input type="checkbox"/> Last Proces...	
1	<input type="checkbox"/> Eloqua Contact	Amazon S3	Ingest	Success	Active	1/7/2024, 7:50 AM	65,535	65,535	
2	<input type="checkbox"/> Eloqua Engagement Data	Google Big Query	Direct Access (Accelerated)	Success	Active				
3	<input type="checkbox"/> Marketing Cloud Subscriber	Google Cloud Storage	Ingest	Success	Active	1/6/2024, 6:34 PM	20,482	20,482	
4	<input type="checkbox"/> Oracle Unity Profile	Amazon S3	Ingest	Success	Active	1/7/2024, 7:43 AM	65,535	65,535	
5	<input type="checkbox"/> SFMC Campaign 1483813	Salesforce Marketing Cloud	Ingest	Success	Active	1/8/2024, 11:29 AM	1	0	

# Identity Resolution - Unified Account

The screenshot displays the Salesforce Data Cloud Identity Resolution interface. At the top, the navigation bar includes links for Home, Data Streams, Data Lake Objects, Data Model, Data Explorer, Identity Resolutions (which is the active tab), Profile Explorer, Calculated Insights, Data Action Targets, Data Actions, Segments, and More. A search bar and various global navigation icons are also present.

The main content area shows a profile named "UnifiedAccount". Key details include:

- Data Space: default
- Primary Data Model Object: Account
- Ruleset ID: DC1
- Ruleset Status: Published
- Last Job Status: Succeeded
- Last Job Completed: 1/8/2024, 8:18 AM

Below this, there are three tabs: Ruleset Properties (selected), Details, and Processing History.

**Ruleset Properties** section:

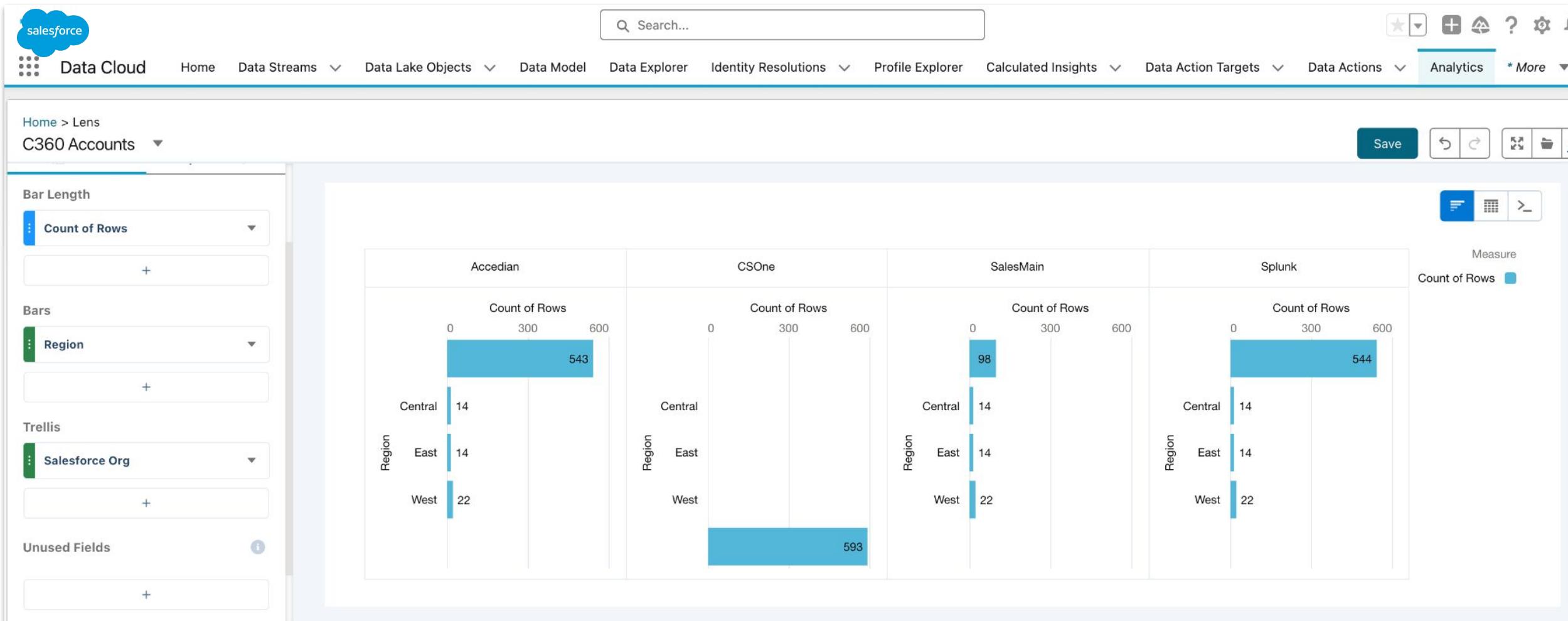
- Match Rules**: Contains a single rule: Match Account Number.
- Reconciliation Rules**: Provides instructions for handling conflicts between data sources. It states: "Matched data sources may provide different values for a single field. Reconciliation rules specify how to select the best value to save to the unified profile. Review default rules and modify as needed. To update multiple fields, use Update Selected." Below this are two sections: "Account" and "Contact Point Address".

**Resolution Summary** section:

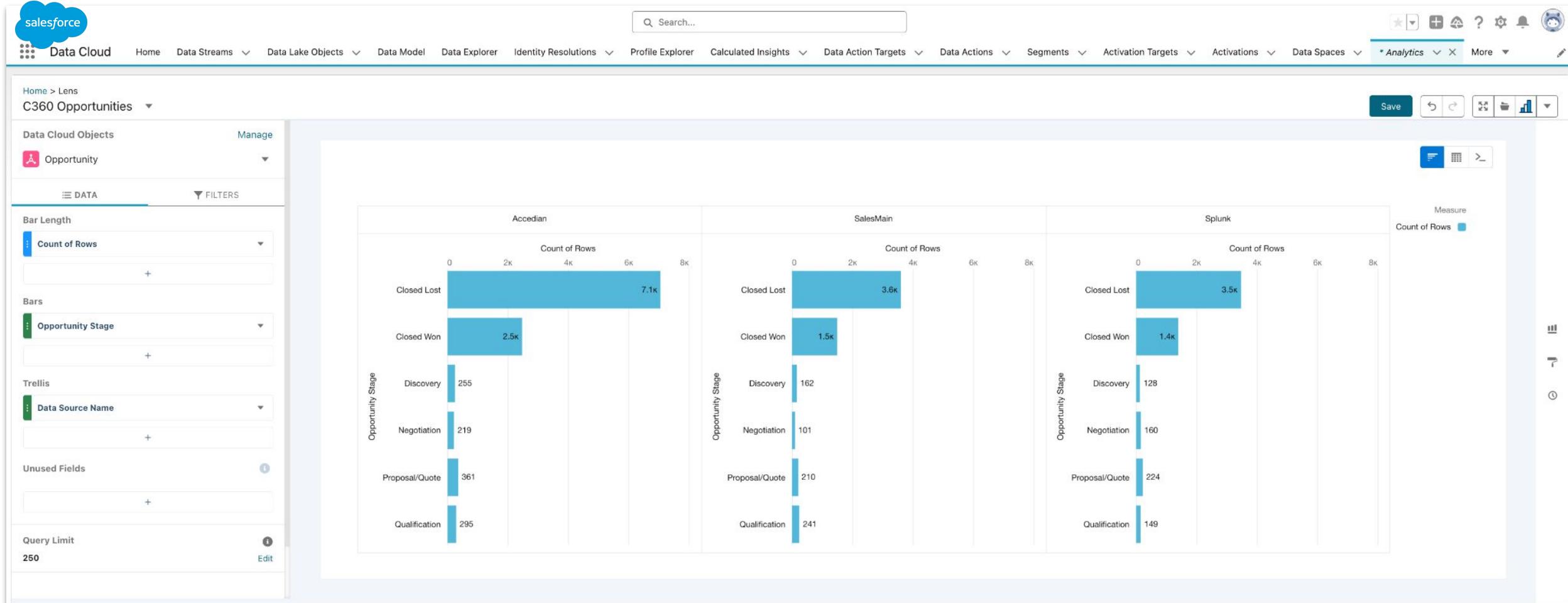
- Total Unified Profiles: 1.75K / 1.93K Source Profiles
- Consolidation Rate: 9%
- Matched Source Profiles: 261

At the bottom right, there are "Post" and "Question" buttons, a "Share an update..." input field, and a "Share" button.

# CRM Analytics - Accounts



# CRM Analytics - Opportunities



# Querying Data - Opportunities

Salesforce Opportunities page for Account Omega, Inc. showing 5 opportunities from other sales orgs. The page includes a search bar, a table with columns: Name, Amount, Stage, Type, Close Date, and Source Org, and a Refresh button.

Name	Amount	Stage	Type	Close Date	Source Org
Accedian - Services	\$70,000	Negotiation	Services	01/04/2024	Accedian
Accedian -- License Upsell	\$461,646	Negotiation	New Business	01/04/2024	Accedian
Accedian -- Trial Conversion	\$11,445	Qualification	Services	01/04/2024	Accedian
Omega Splunk - Renewal Opportunity	\$61,080	Negotiation		10/17/2023	Splunk
Splunk - Disaster Recovery Add-On	\$72,670	Qualification		10/14/2023	Splunk

Data Cloud Data Explorer showing opportunities for the Data Model Object. The page includes a search bar, a table with columns: Name, Close Date, Total Amount, Opportunity Stage, Opportunity Type, and Data Source Name, and a Refresh button.

Name	Close Date	Total Amount	Opportunity Stage	Opportunity Type	Data Source Name
Missoula & Sons Inc. - New Business - 39K	1/4/2024, 04:00 PM	39,000	Proposal/Quote	New Business	Accedian
Crowe Chizek & Co 560	1/3/2024, 04:00 PM	60,263	Closed Won	New Business	Accedian
Farmers Group 25	1/7/2024, 04:00 PM	243,342	Closed Won	New Business	Accedian
XPower - New Business - 44K	1/6/2024, 04:00 PM	41,800	Qualification	New Business	Accedian
Haven Enterprises - Services - 115K	1/3/2024, 04:00 PM	115,000	Negotiation	Services	Accedian
Silodyne Company - Services - 11K	12/29/2023, 04:00 PM	11,000	Negotiation	Services	Accedian
Silodyne Company - Services - 6K	12/29/2023, 04:00 PM	6,000	Negotiation	Services	Accedian
Advanced Communications - Add-On Business - 27	7/27/2023, 05:00 PM	27,000	Proposal/Quote	Add-On Business	Accedian
Advanced Communications - Add-On Business - 4C	3/30/2024, 05:00 PM	0	Discovery	Add-On Business	Accedian
Allied Technologies - New Business - 27K	12/30/2023, 04:00 PM	26,800	Closed Won	New Business	Accedian
XPower - Services - 44K	5/1/2024, 05:00 PM	43,750	Qualification	Services	Accedian

# Calculated Insights - Opportunities Total Won

Calculated Insights Builder

Editing Opportunities Total Won

Update

Unified Account DC1

Join

Join

Filters

Aggregate

AGGREGATE Aggregate

Fields

Fields Name	API Name	Type	Source
TotalAmountWon	TotalAmountWon	Number	Derived Field
AccountNumber	AccountNumber	Text	Unified Account DC1
UnifiedAccountId	UnifiedAccountId	Text	Unified Account DC1

MEASURES

TotalAmountWon	Opportunity	Sum Total Amount
----------------	-------------	------------------

DIMENSIONS

Unified Account DC1	Account Number
---------------------	----------------

# Data Actions on Calculated Insights

salesforce

Data Cloud Home D

Data Action Opportunities Total W

Data Space default Status Active

Configuration Details

Action Targets (1)

Data Action Target Name 1 SalesMain - Platform Event

Event Rules

Record Created OR Record Updated

Conditions

Search...

X ▾ + ⚡ ? ⚙ 20+ 🐱 Segments More

Edit Opportunities Total Won Threshold

Data Action Target Data Space and Objects **Data Action Rules** Properties

**Event and Action Rules**

**Event Rules** Select record actions that trigger the action.

Record Created  
 Record Updated  
 Record Deleted

**Action Rules**

\* Publish data when: All Conditions are Met (AND)

\* Object: Opportunities To... \* Attribute: TotalAmountWon \* Operator: Is Greater Than \* Value: 1,000,000

+ Add Condition

**Summary**

**Data Action Target** SalesMain - Platform Event Salesforce Platform Event

**Data Space** default

**Primary Object** Opportunities Total Won Calculated Insight

**Event Rules** Record Created OR Record Updated

**Action Rules** TotalAmountWon > 1000000

Share

# Data Actions on Calculated Insights

Salesforce Sales Home Chatter Accounts ▾ Contacts ▾ Leads ▾ Opportunities ▾ Dashboards ▾ Reports ▾

Search... Star ▾ + 🌐 ? ⚙️ 📡 20+

Account Omega, Inc. Edit New Opportunity View Account Hierarchy

Alerts

**Business Events**

1

✓ High Total Customer Spend \$9,319,075! 14:09  
Origin: Data Cloud  
Account: Omega, Inc.

New

**High Total Customer Spend \$9,319,075!**

Account: Omega, Inc.

technology www.omegainscorporated.com

**Total FY24 ACV Closed**

\$9,319,075

**Purchase Likelihood Score for Splunk**

**73** TOTAL SCORE

**LEADING CAUSES**

+50	Engagement with Splunk Content: Visited landing page, signed up for a free trial
+25	Upcoming SD-WAN renewal
-10	Decreased interest in hybrid cloud solutions

# Segment Builder - segmenting on attributes from across marketing platforms

salesforce

Search... Star ▾ + ⚡ ? ⚙ 🔍 📡

Data Cloud Home Data Streams ▾ Data Lake Objects ▾ Data Model Data Explorer Identity Resolutions ▾ Profile Explorer Calculated Insights ▾ Data Action Targets ▾ Data Actions ▾ Segments ▾ More ▾

**Segment** **Splunk ABM Campaign Q2 2024** Segment On Unified Individual DC2 Publish Schedule Don't refresh Edit Properties Done

**Attributes** **Segments** Segment Status Active Save

Search Attributes

Agent Work (22) Agent Work Skill (10) BQ Engagement Data (15) Case (33) Case Update (13) Einstein Email Engagement Scores (18) Email Engagement (27) Email Message (17) Engagement Topic (11) Lead (35) Marketing Profile Data - Eloqua (29) Marketing Profile Data - SFMC (14) Marketing Profile Data - Unity (20) Product Usage (21)

**Segment Population** 7,515 4% of 155998 total population Excluded: 0

**Include** **Exclude**

Marketing Profile Data - Eloqua: Count At Least 1  
Marketing Profile Data - Eloqua • Engagement Score Is Between 60 AND 100

Marketing Profile Data - SFMC: Count At Least 1  
Marketing Profile Data - SFMC • Email High Engagement Is Equal To TRUE

Marketing Profile Data - Unity: Count At Least 1  
Marketing Profile Data - Unity • Num Page Views Is Greater Than Or Equal To 1

+ Add another Attribute here

The screenshot shows the Salesforce Data Cloud Segment Builder interface. A segment named "Splunk ABM Campaign Q2 2024" is being configured. The segment is set to run on "Unified Individual DC2" and has a "Don't refresh" publish schedule. The status is "Active". The segment population is 7,515, which is 4% of the total population of 155,998. The configuration includes three inclusion criteria based on Marketing Profile Data from Eloqua, SFMC, and Unity, each with specific engagement thresholds. The interface also shows a sidebar with various attribute categories like Agent Work, Email Engagement, and Product Usage.

**Segment Activation to a variety of marketing platforms - Eloqua, SFMC, Marketo, Unity**

The screenshot shows the 'New Activation' wizard in the Salesforce Data Cloud interface. The top navigation bar includes the Salesforce logo, a search bar, and various global navigation icons.

**Left Sidebar:**

- Data Cloud
- Home
- Data Streams

**Recently Viewed:** A list of 4 items updated a few seconds ago, including:

- Activation Q2 Splunk
- ABM Campaign 4
- Splunk ABM Campaign Q4 2024 Activation
- First 90 Day Onboarding Activation

**Main Content Area:**

### New Activation

Select a segment, activation membership, and activation target.

**Segment:** default

**Activation Target:** Splunk ABM Campaign Q2 2024

**Activation Summary:**

- default**: Default data space where all the current DLOs are made members
- Splunk ABM Campaign Q2 2024**: Segment On: Unified Individual DC2, Publish Schedule: ⚠️ Don't refresh

**Bottom Buttons:**

- Cancel
- Continue

**Right Panel:**

- Activations
- More
- New
- his list...
- Activation Status: Active, Active, Active, Active