

Introduction to Salesforce Data Cloud

Salesforce Data Cloud

Salesforce Data Cloud (previously known in other forms as Customer Data Platform or similar) is a **cloud-native data platform** offered by Salesforce that enables organisations to **ingest, unify, analyse, and activate data** about customers, products, events, or behaviour — all within the Salesforce ecosystem. It brings together data from multiple systems into a “**profile layer**”, applies identity resolution to build unified records, supports real-time segments & analytics, and enables activation of that data across marketing, sales, service, and operations.

Key Capabilities

- **Data ingestion** from many sources (CRM, ERP, web, mobile, IoT, external files).
- **Unification / Identity resolution:** Matching and linking records into unified profiles (often called “golden records”).
- **Data modelling & governance:** Building data models, managing attributes, enforcing rules, managing data quality.
- **Real-time activation & analytics:** Segmenting, scoring, analysing, and activating data in real time.
- **Integration into the Salesforce ecosystem:** Works with Marketing Cloud, Sales Cloud, Service Cloud, as well as external tools.
- **Use for AI, insights and next-best-action:** Once unified, data can power predictive analytics, recommendations, personalised journeys.

2. Why Use Data Cloud?

Some of the primary business motivations include:

- **Break down data silos:** Many organisations have customer data scattered across systems; Data Cloud helps bring it together.
 - **Build one source of truth (360 profile):** By unifying data, organisations gain a better understanding of each customer / entity.
 - **Enable real-time decisions:** Because data and activation happen in near real time, marketing, sales and service can act with fresh information.
 - **Drive personalised customer experiences:** With unified profiles and attributes, organisations can craft targeted journeys, offers and communications.
 - **Improve analytics and business insight:** By centralising data and modelling it, organisations can derive insights, perform segmentation, scoring, and feed AI.
 - **Governance, compliance & agility:** Because it resides in the Salesforce ecosystem, data governance, access control and compliance become more manageable for many organisations.
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3. Use Cases & Examples

Here are some representative use cases with explanatory examples:

3.1 Enhanced Customer Segmentation & Personalisation

Example: A retail business collects purchase history, online browsing behaviour, in-store interactions and loyalty programme data. Using Data Cloud, they build a unified

profile of each customer, segment them into high-value frequent shoppers, and deliver targeted promotions or real-time offers on the website or mobile app.

3.2 Real-time Engagement & Activation

Example: A technology firm tracks when a prospect visits a pricing page or downloads a white-paper. Data Cloud captures that behaviour, enriches the lead's profile, triggers a real-time notification to the sales rep via Slack, and automatically sends a relevant email via Marketing Cloud.

3.3 Data Governance & Profile Unification

Example: An organisation with multiple business units has duplicate records across systems. They use Data Cloud to apply identity resolution rules and build unified profiles, then feed those back into CRM / Marketing Cloud to eliminate duplicate contacts and improve campaign accuracy.

3.4 Industry-Specific Applications

- **Retail & eCommerce:** Real-time loyalty offers, cart abandonment flows, dynamic product recommendations.
 - **Financial Services:** Personalized financial product recommendations, fraud detection using behaviour patterns.
 - **Healthcare & Life Sciences:** Unified patient profiles merging clinical, behavioural and device data to deliver tailored care.
 - **Telecommunications:** Predict churn, upsell customers, optimise service based on usage data.
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4. Implementation Approach: Typical Steps

1. **Discovery & data inventory** – Identify data sources, systems, attributes, business requirements.
2. **Design data model** – Define objects (e.g., Person, Account, Event), attributes, relationships.
3. **Ingestion & streaming setup** – Connect data sources (files, APIs, streams) into Data Cloud.
4. **Identity resolution / matching rules** – Set up match and reconciliation rules to unify profiles.
5. **Data quality / governance** – Ensure cleansing, standardisation, deduplication, policy enforcement.
6. **Segmentation analytics & activation** – Build segments, scoring, real-time triggers, integrate with Marketing, Service, Sales.
7. **Visualization & insight** – Leverage dashboards, analytics tools to monitor KPIs, trends.
8. **Continuous optimisation** – Monitor usage, clean data, refine rules, review business outcomes.

5. Case Study: Terrapinn (Events Industry)

Background

Terrapinn is a global events company based in the UK. They had data scattered across multiple systems, and their CRM was being used for top-of-funnel (TOFU) data that was causing costs and duplication.

Challenges

- Using CRM (Sales Cloud) as primary data store for raw top-of-funnel records, leading to inflated CRM storage consumption.
- Duplicate records and fragmented data sources.

Solution

- They used Data Cloud as a landing zone for raw data (e.g., from AWS S3) and compared it against existing CRM data.
- Merging multiple sources and normalising fields to prepare a cleaned “Prospect” object for Marketing Cloud and CRM.
- Implemented match-rate of over 70%. Reduced contact growth and duplicate build-up.

Results

- Removed ~4.5 million CRM records from bloat.
- Reduced CRM storage usage from ~145% to ~84% of allowed limits.
- Saved more than USD 50,000 per year on storage costs.

Key Learnings

- Use Data Cloud as **pre-CRM staging** for large volumes of prospect or marketing data.
- Identity resolution and deduplication deliver cost savings and operational efficiency.
- Cleaner data enables better marketing segments and activation.

6. Benefits & Considerations

Benefits

- Unified customer profiles and improved customer understanding.

- Better marketing, sales & service effectiveness through real-time activation.
- Data cost reduction (CRM storage, duplicate records).
- Faster, more agile analytics & segmentation.
- Improved governance and data compliance.

Considerations / Challenges

- Adoption of good identity resolution rules is critical but can be complex.
 - Large volumes of data ingestion and processing may consume significant credits (in Salesforce's credit model).
 - Organisations must align business processes, data quality, and governance to fully realise value.
 - Costs need careful planning (credit consumption, storage, transformation).
 - Some feedback notes performance and cost pressures in large scale environments.
 - Ensuring all data sources are properly connected and cleaned is non-trivial.
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7. Summary

Salesforce Data Cloud offers a powerful solution for organisations that need to **break down data silos**, build **unified profiles**, and create **real-time insight and activation** across customer journeys. When implemented carefully — with good data governance, identity resolution, and alignment to business use cases — it can deliver meaningful business value: higher engagement, reduced costs, and improved decision-making. The Terrapinn case shows how a targeted implementation can yield rapid benefit.