

Narrative Flow for Salesforce CDP Presentation

Deck Section	General Talk Track
Challenges	Customers expect personalization, and marketers know having a single source of truth is the way to deliver it. But there are too many disconnected legacy systems to create modern journeys. Plus, customers are moving so fast between so many channels, they need a moment-oriented architecture to keep up.
Our POV	CDP is not a new category. It's part of the longstanding evolution of CRM, and Salesforce is leading because customers want their SSOT where the weight of their first party datas resides: the CRM system. You need a CDP that is based on a real data platform -- one that delivers on the "five Vs" and also connects beyond its own ecosystem to include all of your data under management (Mulesoft) and your vendors (AppExchange).
Capabilities	Salesforce CDP wins because of the "power of the platform" -- infrastructure built on Hyperforce, baked with capabilities from Mulesoft, Dataroma, and Tableau, and already connected to all the systems of engagement. It helps marketers Ingest data, built a first party data asset with Trust, understand customer Identity, Segment and Activate audiences at scale, and understand them through deep data Insights.
Use Cases	Salesforce CDP can be used throughout the entire customer funnel from acquisition to retention. Our customers use it to light up use cases in marketing, advertising, personalization, and analytics. Here is how CDP connects to the entire Salesforce marketing ecosystem for Messaging, Advertising, Personalization, and Analytics.
Roadmap	Our platform is fully featured today, and getting more powerful through deep integrations with Loyalty Cloud, Commerce Cloud, Interaction Studio, Tableau, Dataroma and Mulesoft. Plus, we are embedding intelligence into everything with Einstein. Every release of the core Platform brings more capability to our CDP.



CDP Capabilities

Advanced platform functionality to power success



Salesforce CDP

Personalize every interaction with AI at hyperscale

GENERALLY
AVAILABLE



Build a Trust-Based First Party Data Asset

Create compliance with consumer privacy laws through capturing and activating known and unknown data with consent

Create a Single Source of Truth

Ingest and unify data from anywhere to reconcile customer identity and understand the complete picture for each individual

Go Beyond Marketing

Use unified data to make every engagement contextual, personalized, and human across marketing, commerce, service, and sales

Supercharge Analytics

Make better decisions faster by understanding your customer in any moment through AI-powered insights and analytics

Adapt to the Cookieless Future

Empower your teams to build applications, unleash data science with an AI workbench, and automate experiences across clouds

The screenshot shows the Salesforce Data Cloud interface. At the top, there's a navigation bar with links like 'Data Cloud', 'Home', 'Data Streams', 'Data Model', 'Identity Resolution', 'Calculated Insights', 'Customer 360 Profiles', 'Tableau', and a search bar. Below the navigation is a profile card for 'Maria Alonso' from 'Palo Alto, CA'. The card displays three main sections: 'Customer 360 Profile' (with ID MD33DCF54ED023392), 'Sales & Service Profile (1)', 'Marketing & Social Profile (4)', and 'Commerce Profiles (16)'. There's also a 'View Data Lineage' button. To the right of the card is a detailed 'Profile Details' section for 'Customer 360 Profile'. It includes tabs for 'Attributes', 'Calculated Insights', 'Source Records', and 'Change History'. Under 'Attributes', there's a table for 'Unified Individual (4)' with columns for 'Attribute' and 'Value'. It lists Name (Maria Alonso), Gender (Female), Date of Birth (07/01/1988), and Credit Score (732). Below that is a 'Contact Points (7)' section with a table showing Address (37487 Parish Ct, Palo Alto, CA 94086, USA), Phone Number (+1 (619) 309-1265), Email (almaria@gmail.com), Email (maria@mboutiques.com), and Device ID (*****). A 'Change History (1)' section shows a recent update where the address was changed to 37487 Parish Ct, Palo Alto, CA 94086, USA, by Maria Alonso on 3/20/2021 at 7:12PM.



Ingestion

Consume or activate data to any cloud and any application



Select Activation Platforms(s)

Selected Goals: Increase Lifetime Value X | Drive Conversion X | Grow Reach X | [Edit](#)

Select Activation Platform(s) from the recommended list or expand to see all.

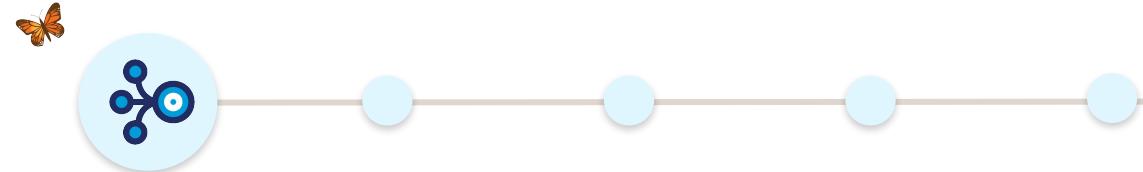
Activation Platform	Conversion	Reach	Selected
Messaging-US Journey Builder	200,076	400,083	<input checked="" type="checkbox"/>
Google Ad Manager	173,346	221,367	<input type="checkbox"/>
Pardot	72,532	210,083	<input type="checkbox"/>
Roku	163,210	290,083	<input type="checkbox"/>
Comcast	92,874	137,989	<input checked="" type="checkbox"/>

[See All Platforms \(54\)](#)

[Cancel](#)



Build your first party data asset!



Native Connectivity

Trusted connections to Sales, Service, Marketing, Commerce and Tableau data

Batch Ingestion

High-scale batch ingestion service for enterprise data

Streaming Data Ingestion

Streaming service for realtime access to web and app based data, from our integrated webtag and mobile SDK

API Access

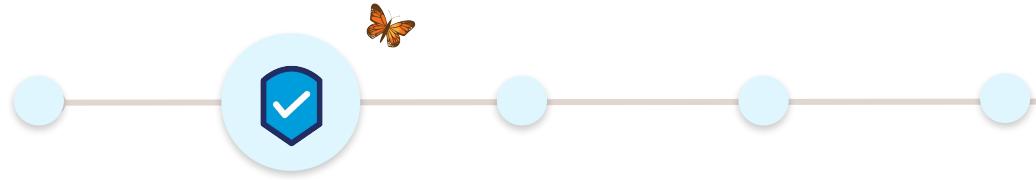
Leverage the power of MuleSoft to access many different sources of enterprise data -- plus easy access to AWS S3

Trust

Collect, manage and honor customer privacy and consent settings

The laptop screen shows a "Settings / Communication Preferences" page for "northern trail". It includes sections for "Contact Information" (Email: bruce.wayne@gmail.com, Phone Number: +1-510-294-2039) and "Preferences" (Product Recommendations, Promotions, Order Updates). A blue circular callout over the laptop screen contains the text: "Actively manage your customers' consent preferences". Below the laptop is a mobile phone displaying the same "My Preferences" screen.

*Coming soon



Manage Data Lifecycle

Define retention and archive policies to adhere to data retention regulation

Automate Data Subject Rights

Enable automatic deletion, anonymization, and data access policies

Unify Consent and Preferences*

Create a Preference Center with reusable Lightning components without writing code

Visualize Compliance*

Track data and compliance using Privacy Analytics to keep privacy at the center of business

Identity

Connect, match, and resolve customer data



The screenshot shows the Salesforce Identity Resolution interface. At the top, there's a navigation bar with options like All, Search Salesforce, SSOT, Home, Data Streams, Data Model, Identity Resolution, Calculated Insights, and Data Explorer. Below the navigation is a section titled "Identity Resolution Unified Individual". It displays profile details: Profile Object (Individual), Status (Active), Last Run Status (Success), Last Run (3/20/2021, 1:58 PM), and Last Modified (3/18/2021, 4:25 PM). There are tabs for Rules Configuration, Details, and Processing History. Under Rules Configuration, there are sections for Match Rules (Fuzzy Name and Fuzzy Email OR Fuzzy Name and Exact Phone) and Reconciliation Rules (with a table showing columns for Name, Reconciliation Rule, and Default). A large blue circle with white text overlays the middle of the interface, reading "Unlock the single source of truth inside your data". In the bottom right corner, there's a cartoon character of a brown bear wearing a white t-shirt with a blue cloud logo, pointing upwards.

Unlock the
single source
of truth
inside your
data



Advanced Identity Resolution

Resolve customer identity using flexible rules with exact and AI-powered advanced (fuzzy) matching

Unify Customer Profiles

Reconcile matched customer data into a unified profile with a single global party ID

Streamline Enterprise Data Management

Standardize data models and locate profile data across silos with a click-based UI

Cross Device Identity Management

Enrich profiles with first party pseudonymous data, including first party cookies, device IDs, MAIDS, and HEMs

Segmentation and Activation

Create smart segments and activate anywhere



A screenshot of the Salesforce Segment builder interface. At the top, there's a navigation bar with links like Audiences, Home, Data Streams, Data Model, Segments (which is highlighted in orange), and Activations. Below the navigation, a segment named "Premium Shoe Fans" is selected. The main area shows a summary card with "35,076" population and a condition "Gender Name Equal to (=) Female". A modal window titled "Sales Order Product" is open, showing two conditions: "Product Name Contains Shoes" and "Grand Total Amount More than (>) 100". A large blue circle with the text "No Code Required!" is overlaid on the interface. A small, friendly-looking white goat-like creature is standing next to the modal window, pointing towards it.

All of your Data

Access data from Marketing, Sales, Service, Commerce, data warehouses and lakes, and any source available on demand

Smarter Data

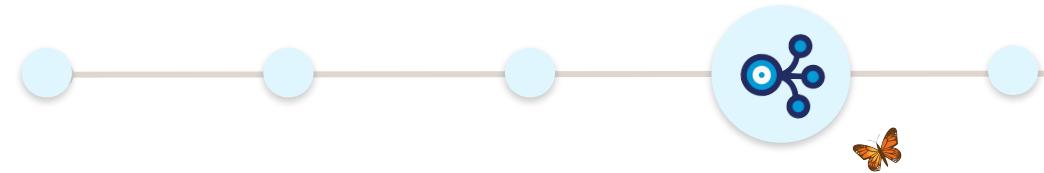
Leverage integrated Einstein calculated attributes to add modeled data like propensity and LTV scores

Immediate Results

Run unlimited queries and get immediate segment populations, unlocking the ability to test and learn

Activate Anywhere

Activate your data for advertising, marketing, and personalization through every MC product and send to external partners



Insights

Embed your data with intelligence and make it available to analytics systems



Analytics
powered by
Einstein

Einstein

Leverage AI to drive recommendations and insights -- and take advantage of embedded calculated insights for scoring and modeling



Tableau Integration

Unlock cross-organization business insights in Tableau, the world's leading analytics tool

Datorama Integration

Enhance your marketing optimizations with audience insights automated via our API into Datorama

Data Access for Business Insights for Any BI / AI

Enable any Java-based application to interact with your data, increasing time to value