

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.

salesforce

Salesforce CDP

First Call Deck

Chris O'Hara
Data & Identity PMM





Forward-Looking Statements



"Safe harbor" statement under the Private Securities Litigation Reform Act of 1995: This presentation contains forward-looking statements about the company's financial and operating results, which may include expected GAAP and non-GAAP financial and other operating and non-operating results, including revenue, net income, diluted earnings per share, operating cash flow growth, operating margin improvement, expected revenue growth, expected current remaining performance obligation growth, expected tax rates, stock-based compensation expenses, amortization of purchased intangibles, shares outstanding, market growth, environmental, social and governance goals and expected capital allocation, including mergers and acquisitions, capital expenditures and other investments. 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, the company's results could differ materially from the results expressed or implied by the forward-looking statements it makes.

The risks and uncertainties referred to above include -- but are not limited to -- risks associated with the effect of general economic and market conditions; the impact of geopolitical events, natural disasters and actual or threatened public health emergencies, such as the ongoing Coronavirus pandemic; the impact of foreign currency exchange rate and interest rate fluctuations on our results; our business strategy and our plan to build our business, including our strategy to be the leading provider of enterprise cloud computing applications and platforms; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; the competitive nature of the market in which we participate; 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 service performance and security, including the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate potential security breaches; the expenses associated with our data centers and third-party infrastructure providers; additional data center capacity; real estate and office facilities space; our operating results and cash flows; new services and product features, including any efforts to expand our services beyond the CRM market; our strategy of acquiring or making investments in complementary businesses, joint ventures, services, technologies and intellectual property rights; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; our ability to realize the benefits from strategic partnerships, joint ventures and investments; 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 execute our business plans; our ability to successfully integrate acquired businesses and technologies; our ability to continue to grow unearned revenue and remaining performance obligation; our ability to protect our intellectual property rights; our ability to develop our brands; our reliance on third-party hardware, software and platform providers; our dependency on the development and maintenance of the infrastructure of the Internet; 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; 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; the impact of expensing stock options and other equity awards; the sufficiency of our capital resources; factors related to our outstanding debt, revolving credit facility and loan associated with 50 Fremont; compliance with our debt covenants and lease obligations; current and potential litigation involving us; and the impact of climate change.

Further information on these and other factors that could affect the company's financial results is included in the reports on Forms 10-K, 10-Q and 8-K and in other filings it makes with the Securities and Exchange Commission from time to time. These documents are available on the SEC Filings section of the Investor Information section of the company's website at.

Salesforce.com, inc. assumes no obligation and does not intend to update these forward-looking statements, except as required by law.



Challenges

Getting a single source of truth is hard

Our World Has Changed

And we're not going back



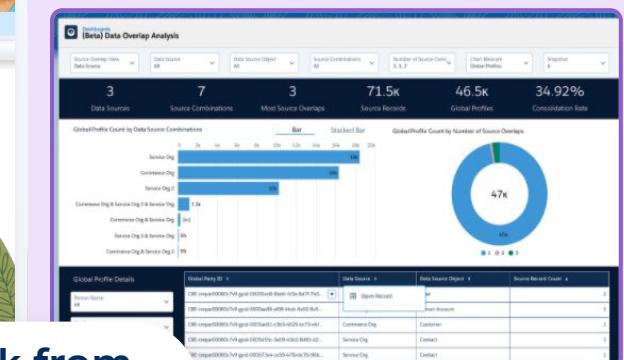
Digital-first
customer



Direct-to-consumer



Work from
anywhere



60%

of people ranked **SSOT** as the **most important digital capability** for their organization

But Personalizing Digital Relationships Is Hard



84%

of customers say that being treated like a person, not a number, is very important to winning their business

Digital-First Customer



43%

of people see SSOT as the top CX challenge they face

Digital Leader



Most Brands Struggle to Create a Single Source of Truth



Service Profiles

00800 753 3333
Samantha Smith

Samantha Smith
s.smith.58221@gmail.com

Different phone numbers

In-Store POS Data
SKU 8wr7013

Marketing Profiles

sam@mystyle.com
s.smith.58221@gmail.com

~75%
No Name

Duplicates

Unintentional



Known &
Unknown Data

~78%
Guest Orders



Legacy Loyalty Data
Gold member

Guest Checkout

Samantha Smith,
sam@mystyle.com,
+44 800-753-2333

Commerce Profile

Sam Smith
s.smith.58221@gmail.com
(0) 800-753-2333

Multiple Emails

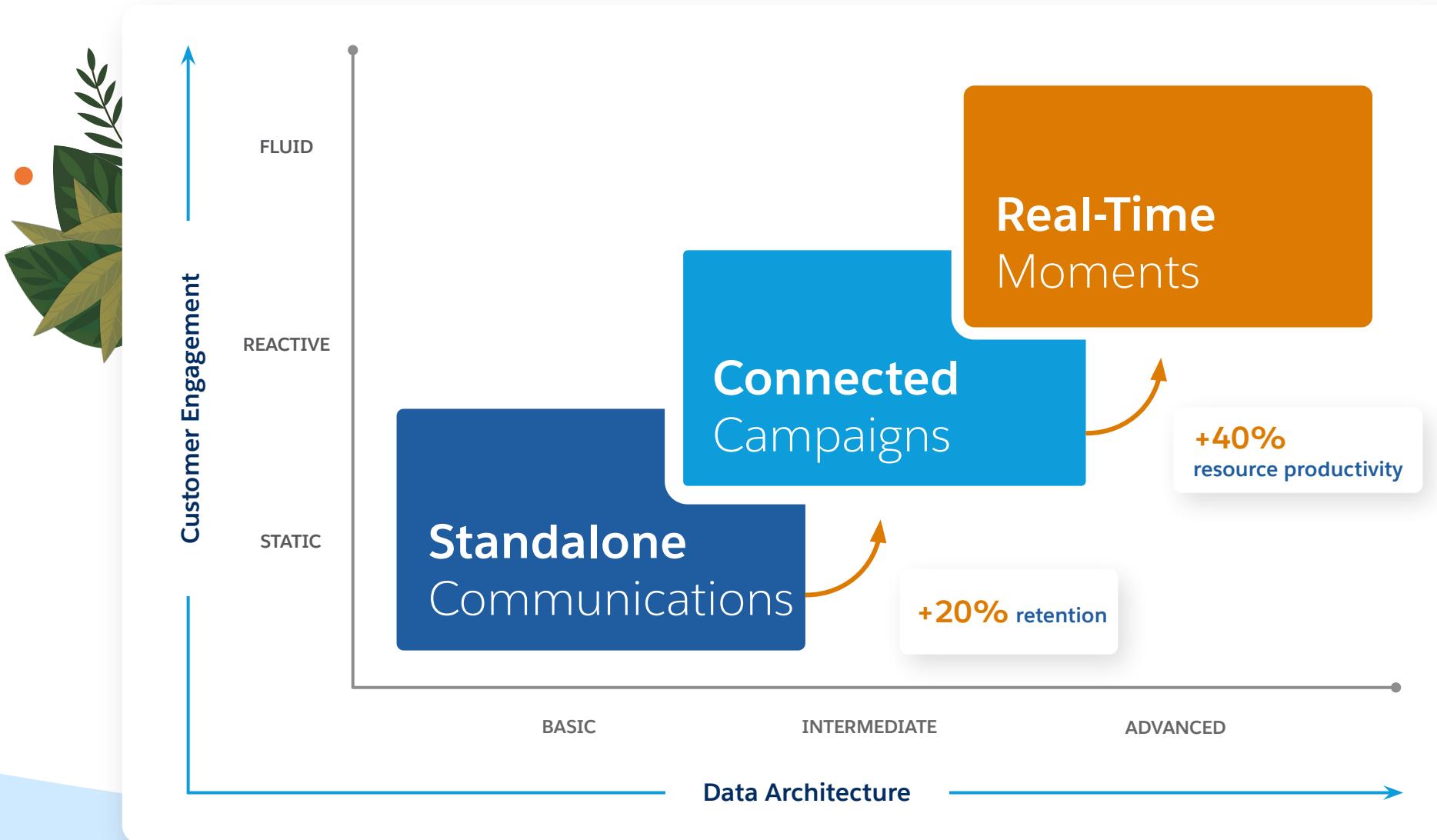


Community Profile
StylishSam

Social Handle Only

BI Tools/Data Science
High LTV

Moment-Based Personalization Requires Big Data

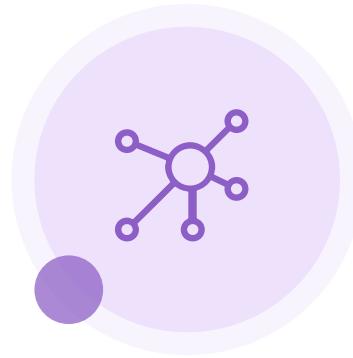


Modern Enterprise Data Management Requirements



Velocity

The ability to ingest data at various speeds, whether in batch mode or in streaming format from disparate systems to consolidate your entire first-party data asset



Variety

The ability to take data in multiple models, with a large variety of different field names, and easily map them into a single information model to unify your data



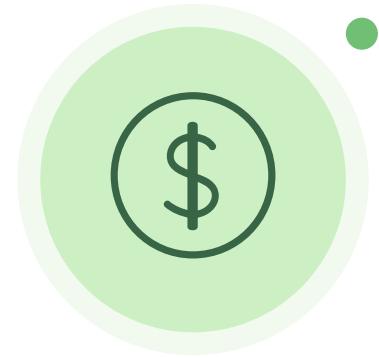
Veracity

The capability to use direct and advanced matching to de-duplicate various IDs and contacts and provision a rich, persistent profile



Volume

The need for a highly scaled, cloud-based infrastructure that can store massive amounts of fast-moving customer data for big data processing



Value

The ability to connect that data to systems -- including an open ecosystem of developers -- to power enterprise-wide digital transformation





Our Unique POV

Defining the Customer
Data Platform category



CDP is Not a New Category

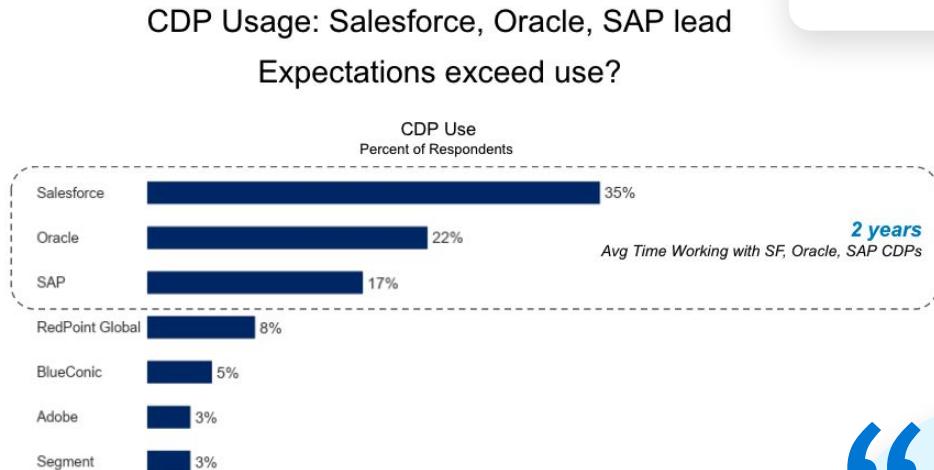


It is the latest trend in the longstanding evolution of data management

1980's	1990's	2000's	2010's	2020+
	CRM			
Database Marketing	Marketing Automation	Multi-Channel Campaign Mgt	CDP	Future
On-premise	Database included	B2C scale	Customer database (MDM)	Automation
SQL	Some analytics	Sequencing	Marketing Automation	Intuitive UI
Structured	Used by marketing	A/B Testing	Multichannel Campaign Management (MCCM)	Personalization
Owned by IT		Better UI	Real-time Interaction Management (RTIM)	Across channels Across time

Top CDPs

Salesforce CDP leading in usage

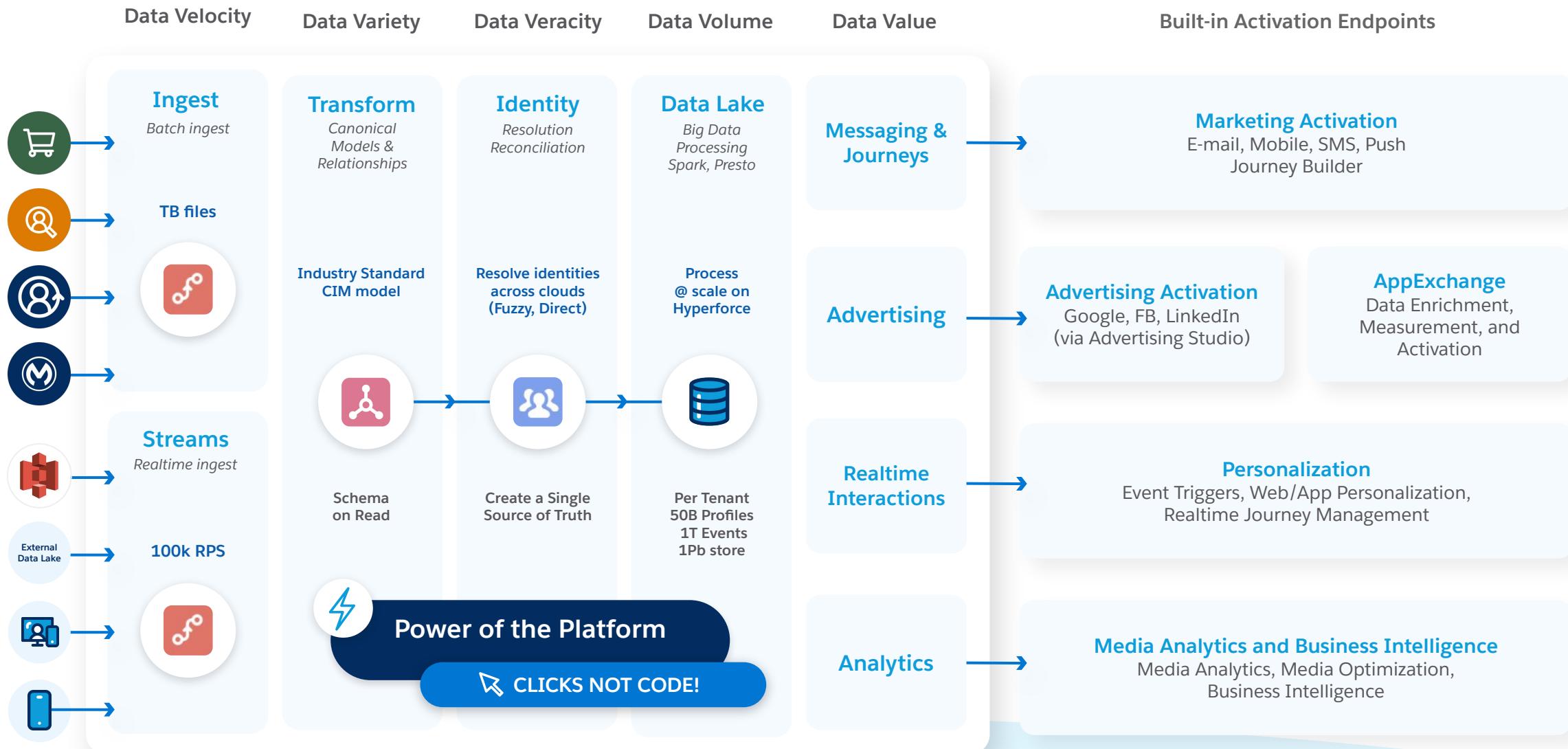


Enterprises are selecting their customer data platforms largely based on where the weight of their first party data resides – **the CRM system.**

“
There's different levels of sophistication and complexity with CDPs.
VP, Marketing + Strategy (Apparel)
”



Platform Functionality Drives CDP Success





CDP Capabilities

Advanced platform functionality to power success



Salesforce CDP

Personalize every interaction with AI at hyperscale



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

A screenshot of the Salesforce Data Cloud interface. At the top, there's a navigation bar with "Data Cloud" selected. Below it is a profile card for "Maria Alonso" from "Palo Alto, CA". The card shows a photo of a woman, her name, and her ID: MD33DCF54ED023392. It also lists three types of profiles: Sales & Service Profile (1), Marketing & Social Profile (4), and Commerce Profiles (16). A "View Data Lineage" button is at the bottom. To the right, there's a detailed "Customer 360 Profile" view. It includes sections for "Unified Individual (4)" (with attributes like Name, Gender, Date of Birth, and Credit Score), "Contact Points (7)" (listing address, phone number, email, and device ID), and "Change History (1)" (showing a recent update from "NTO Retail USA").

Attribute	Value
Name	Maria Alonso
Gender	Female
Date of Birth	07/01/1988
Credit Score	732

Attribute	Value	Type
Address	37487 Parish Ct, Palo Alto, CA 94086, USA	Shipping
Phone Number	+1 (619) 309-1265	Work
Email	almaria@gmail.com	
Email	maria@mboutiques.com	
Device ID	*****	Mobile



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.

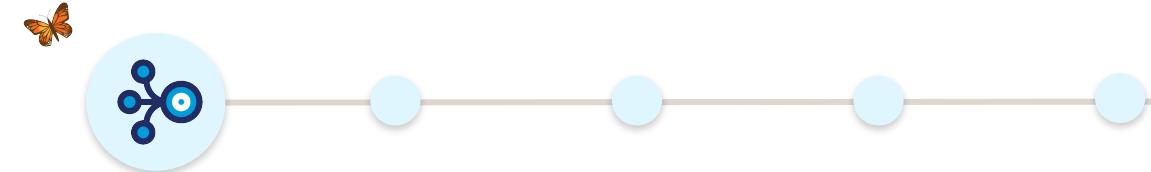
Activation Platform	Conversion	Reach	Selected
Messaging-US Journey Builder	200,076	400,083	<input checked="" type="checkbox"/>
Google Ad Manager	173,346	221,367	<input type="checkbox"/>
Pardot	72,532	210,083	<input type="checkbox"/>
Roku	163,210	290,083	<input type="checkbox"/>
Comcast	92,874	137,989	<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 the 'Settings / Communication Preferences' page for 'northern trail' customers. It includes sections for 'Contact Information' (Email and Phone Number) and 'Preferences' (Product Recommendations, Promotions, Order Updates). A large blue circular overlay on the right side of the screen contains the text: 'Actively manage your customers' consent preferences'.

northern trail

HOME WOMEN KIDS GEAR ELECTRONICS ENERGY ILLUSTRATION

Contact Information

Email: bruce.wayne@gmail.com Edit Email

Phone Number: +1-510-294-2039 Edit Phone

Preferences

Product Recommendations: On/Off

Promotions: Daily, Weekly, Off

Order Updates: On/Off

Settings / Communication Preferences

9:41

onto

My Preferences

Name: First Name Art Last Name Vandelay

Address: 341 W 1st Street, APT A, San Francisco, CA

Email: art@vandelay.com Phone: 324-554-2453

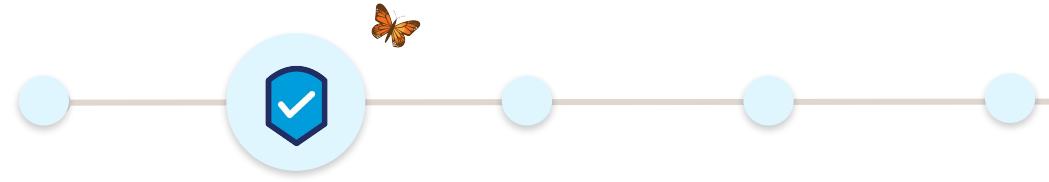
Subscriptions

Product Recommendations: On/Off

Promotions: Daily, Weekly, Off

Order Updates: On/Off

*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 status bar showing 'Identity Resolution Unified Individual' with a profile icon, 'Status Active', 'Last Run Status Success', 'Last Run 3/20/2021, 1:58 PM', and 'Last Modified 3/18/2021, 4:25 PM'. The main area has tabs for Rules Configuration, Details, and Processing History. Under Rules Configuration, there are sections for Match Rules (with a search bar for '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). The table includes rows for various attributes like Name, Gender, Date of Birth, Yearly Income, Address, Email, Phone, Party ID, and Social ID, each with a dropdown menu for rule selection.

Unlock the single source of truth inside your data

A cartoon fox character with brown fur and a white belly is standing on the left side of the slide. It's wearing a white t-shirt with a blue cloud logo on it. The fox is pointing its right paw towards the text '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 a population of "35,076". A large blue circular overlay with the text "No Code Required!" is positioned over the interface. In the bottom right corner of the screenshot, there's a small, friendly-looking white goat-like creature wearing a white t-shirt with the Salesforce logo on it, waving its right hoof. The background of the slide features stylized green trees and blue hills at the bottom.

No Code
Required!

All of your Data

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

Smarter Data

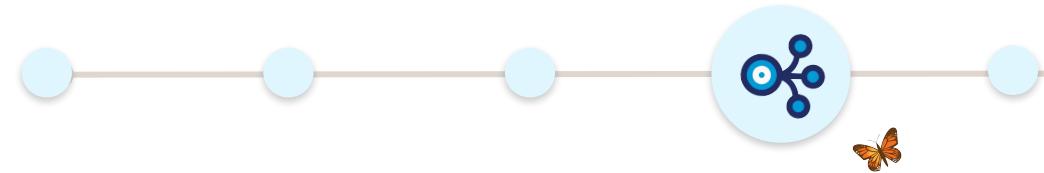
Leverage integrated Einstein calculated attributes to add modeled data like propensity and LTV scores

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



The Einstein character is pointing towards the dashboard, which shows real-time data from ServiceNow. The dashboard includes sections for Incidents, Problems, and Requests, each with its own set of charts and metrics. The Einstein character is depicted with a thoughtful expression, symbolizing the integration of AI and analytics.

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



Use Cases

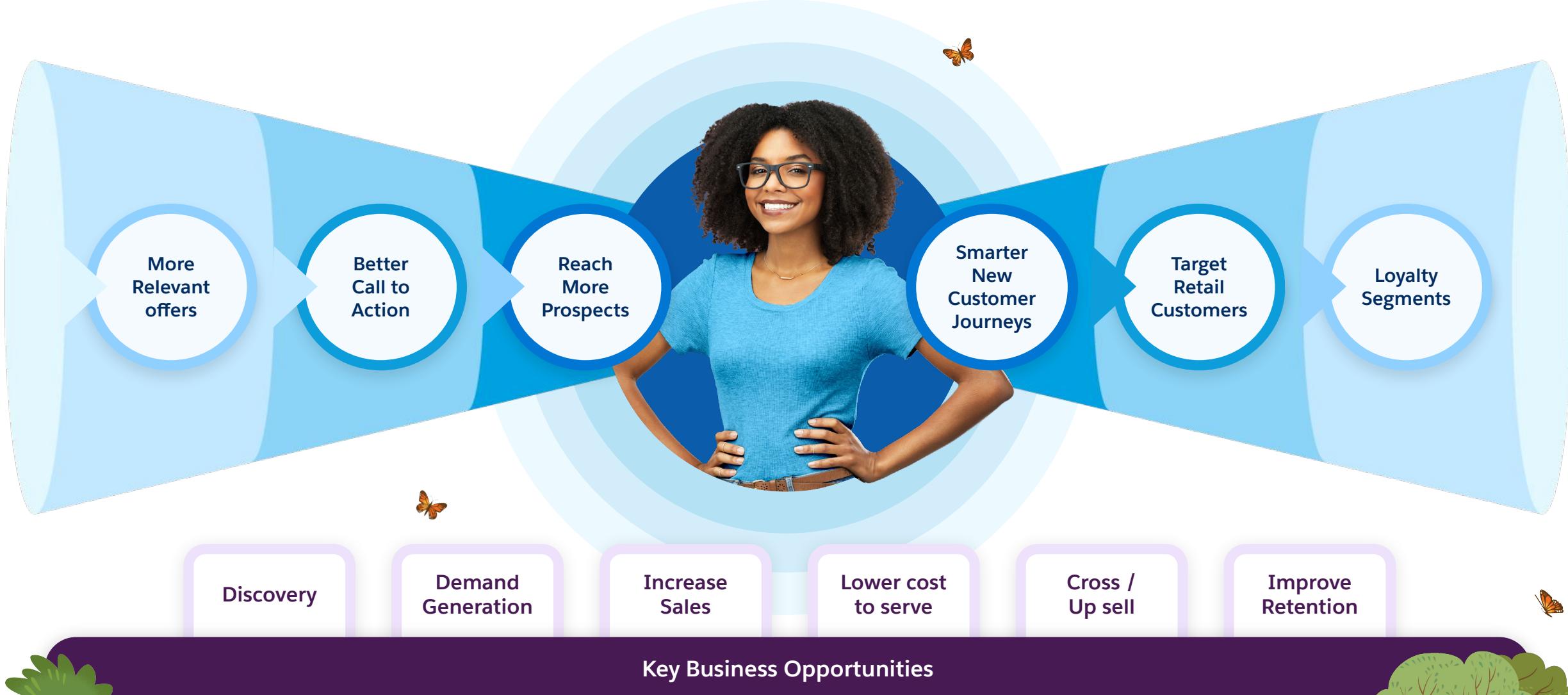
Here is how customers are creating value with Salesforce CDP



Create Value Across The Customer Lifecycle

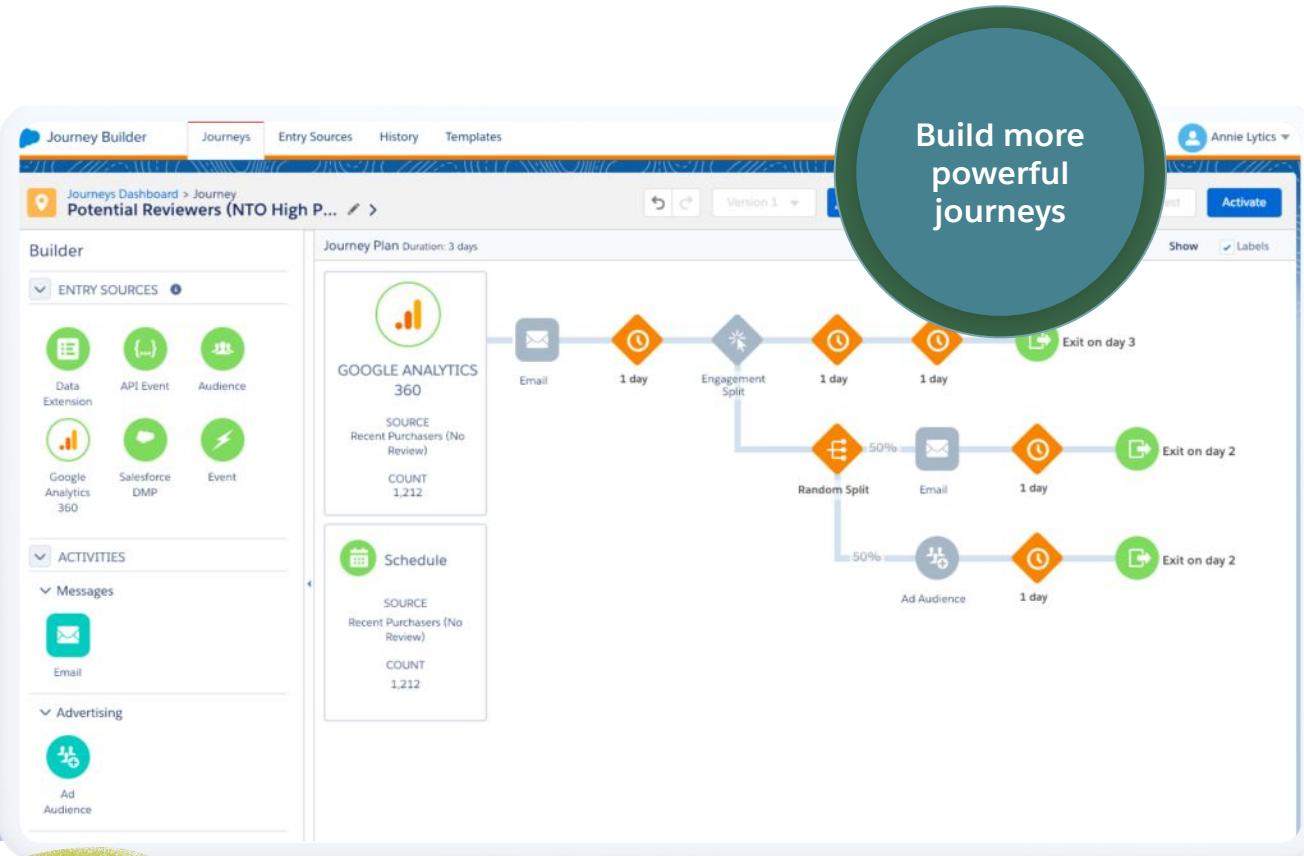


Unified enterprise data unlocks more impact across the entire funnel



Marketing Activation

Supercharge Marketing cloud with precision segments



Activate Journeys

Build powerful segments and launch prescriptive journeys with native connectivity to Journey Builder



Improve E-mail Performance

Go from “batch and blast” to precision e-mail targeting leveraging all of your available data -- no data extensions required



Master Mobile Messaging

Push CDP data into Marketing cloud to align SMS and Push campaigns



Advertising Activation

Master the cookieless future with first-party data activation at scale



The screenshot displays the Salesforce Advertising Studio interface. At the top, there's a navigation bar with links like Home, Clients, Campaigns, Grids Beta, Tracking, Reports, Administration, My Account, and Help. Below the navigation, a sidebar shows '1 Ads' (1 creatives, 1 Segments) and various social media icons. The main workspace shows a campaign for 'Northern Trail Outfitters' with a sponsored post for 'Northern Trail Outfitters' featuring two people on a mountain peak. The campaign details include 'Placements: Desktop Feed and Mobile News Feed', 'Mobile Devices: All Mobile Devices', 'WIFI Targeting: Users with any connection', 'Locations: Atlanta', 'Ages: All Ages', and 'External Audiences: Lookalikes of high value hiking customers'. To the right, there's a preview of a mobile phone displaying a product page for 'WOMEN'S HEDGEHOG GUIDE GTX' shoes. A large yellow circle with the text 'First party data activation at scale' is overlaid on the top right of the interface.

Scale Walled Gardens

Leverage the Advertising Studio activation pipeline to seamlessly light up CDP data into the world's most scaled advertising systems

Connect Programmatic

Push data into Amazon S3 to connect CDP data to programmatic advertising environments including SVOD and over-the-top systems

AppExchange Activation

Safely provision data to your vendor ecosystem -- agencies, advertising platforms, and more with Trust through our integrated marketplace



Realtime Personalization

Power interaction management and moment-based journeys with people data



The screenshot shows the Salesforce Interaction Studio interface. At the top, it displays a user profile for "Rachel Morris" from "San Francisco, CA US". Below this is a map of the United States with a green dot indicating Rachel's location. A timeline at the bottom shows visits between February 11, 2020, and July 6, 2020, with various circular markers representing different interactions. In the center, there is a purple circle with the text "Build more powerful journeys". To the right of the timeline, there are four categories: "Personal" (Banking, Credit Cards, Investing, Mortgage), "Product" (Home Buying, Home Mortgage, Interest Rates, Savings Account), "Category" (Affinity, By View Time, \$), and "Keyword" (Home Buying, Home Mortgage, Interest Rates, Savings Account). At the bottom left, there are tabs for "Overview", "Segment Membership", "Segment Compare", "Action Details", "Event Stream", and "Affinity Details". On the right, there is a detailed view of a specific interaction record for June 16, 2020, at 2:09AM, which lasted 22m 32s. The record includes icons for a house, a person, and a car, and labels such as "Mortgage Loans" and "First-Time Home Buyer". On the far left, there is a "Details" section with user information like User ID (rmorris@gmail.com), User Name (Rachel Morris (Anonymous User)), Email Address (mebb@vergage.com), Account Type (High Value Customer), LTV (\$1,251.00), First Seen (Feb 12 2020), and Last Visit (Jun 30 2020). There is also an "Identity Attributes" section with fields like Email Address (rmorris@gmail.com), kuld (-), Salesforce Contact ID (-), and Advisor Name (Sofia Lopez). The "Attributes" section includes Customer Status (Active) and DMP Persona (Working Professional).

Power Realtime Interactions

Link segments from CDP to Interaction Studio to leverage cross-cloud segmentation with your realtime personalization strategy

Build Realtime Journeys

Master moment-based marketing by connecting prescriptive campaigns and RTIM through shared segmentation



Enrich Segments with Interactions

Capture advertising and marketing interaction data through web tag and mobile SDK and enrich CDP segments with known and pseudonymous interaction data

Enhanced Analytics

Unlock deep insights with a single source of truth to drive results



Supercharge
Analytics
and BI

The screenshot shows the Salesforce AppExchange Marketplace interface. At the top, there's a search bar and navigation links for 'Go to Installed Solutions', 'Apps', 'Connectors', and 'Add On Features'. A large blue circular overlay with the text 'Supercharge Analytics and BI' is positioned in the center. Below the search bar, the word 'Marketplace' is visible. The main area displays several app cards, each with a thumbnail, name, price (FREE or FREE+), and a brief description. One card for 'Salesforce CDP' is highlighted with a larger preview window showing a complex dashboard with multiple charts and data visualizations.

Power Marketing Analytics

Optimize for engagement and conversion with pre-built CDP + Datorama dashboards, informed by Calculated Insights

Create Better BI

Native connectivity with Tableau puts your CDP data to work to understand the “people view” of business performance

Test and Learn

Run unlimited queries in segment builder with modeled data, including Einstein scores





Customer Stories

How are customers using it?



BENTLEY

salesforce

Driving Luxury Customer Experiences with Insight-Led Personalization at Scale

Drives conversion and sales growth with personalized service through a single platform for identifying prospects and qualifying opportunities

Visualizes customer interactions across digital channels, automatically triggering 1-to-1 connected customer journeys at the right time

Connects legacy systems to create a 360-degree customer view and provide remote data access for employees

Analyzes multiple data sources automatically for simplified data extraction, visibility, and real-time decision making

customer360



SALES



SERVICE



MARKETING



PLATFORM



ANALYTICS



INTEGRATION



PARTNERS



SUCCESS

4K
employees
with a single
source of
truth





salesforce

Casey's accelerates focus on personalization to drive guest loyalty and business impact

Shifts from mass marketing to personalization at scale by incorporating multiple data sets into a single source of truth

Focuses on personalization to create relevant and familiar experiences for guests, anticipate their needs and add value at every interaction

Creates and activates guest audience segments with AI, unlocking insights to drive increase in visit frequency and transaction size

Focuses on new ways of working, increasing agility and experimentation leading to scale and impact

10M

Customer records ingested

1.3B

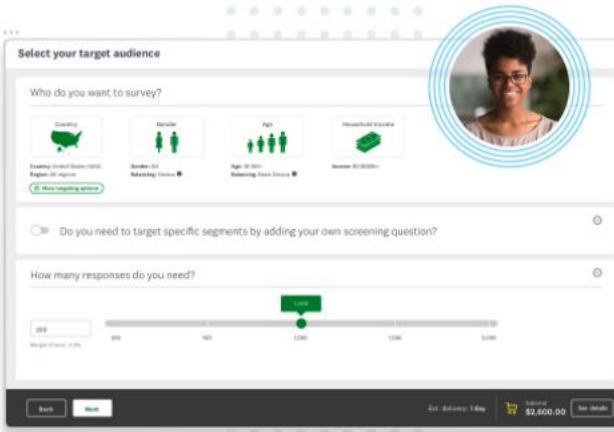
Customer transaction records

+30X

Speed of segment creation



CUSTOMER 360
AUDIENCES



Momentive Upgrades Its Data Management Ahead of a “Cookieless” Future

Harnesses customer data to build smarter emails and deliver a personalized experience at every point of the customer journey

Enables retargeting by monitoring visitors' interactions with the company in real time, and connecting with them on the right channel at the right time

Creates opportunities for cross-selling and targeted marketing by collecting and unifying users' data in a single source of truth

Supports the company's pivot from a third-party data strategy to using insights derived from 1st party data within a customer data platform

2x
return on
investment

8M
new contacts during
COVID-19





Multi-Brand Group Unifies Customer Profiles On Journey Toward Single Customer View

Streamlines and reconciles customer data from subsidiary business units into a single source of truth

Identifies customers as frequent or high-value buyers from deeper, consolidated look into order behavior, creating opportunities to cross-sell across brands

Avoids customer profile deduplication, will save agents time & resources when looking up a customer record

Provides the ability to unify marketing data across brands and systems to create tailored customer experiences

65%
profile consolidation
rate

9
data sources
unified



Attributes 147

Community Engagement
Highly engaged

Add-On Likelihood
Moderate

Adoption Score
Healthy

Location
London, UK

Segment
High Value Banking Target

Activity Einstein

Recommendation
Invite to Finance Virtual Summit

Invite Maria to the London Regional Finance Virtual Summit on January 11, 2021.

[Send email →](#)



WIP
Not approved

Salesforce Digital Creates ‘Always On’ Personalization

Builds the Single Source of Truth for each customer with resolved identity, key attributes, AI-driven insights, engagement history and product recommendations

Powers unique and dynamic web interactions for every individual at scale driving conversion and growth

Gains intelligent insights from customer journeys, creates a feedback loop for subsequent interactions with higher adoption and effectiveness

Shares Truth profiles across organization, surfacing AI and insights for marketing, commerce, sales, and service teams to build customer trust with every interaction

XXM

Customer records ingested

XXB

Customer transaction records

50%

more MQLs



CUSTOMER 360
AUDIENCES

Salesforce CDP Differentiation



Customer 360



Put your Sales, Service, Commerce and Marketing data to work everywhere and enrich analytics in Tableau

Clicks Not Code



Democratize customer data management with a user-friendly interface, built on Lightning

Open



Unlock the power of connected applications through AppExchange to put your data to work



Roadmap

Planned innovation



Salesforce CDP Features at a Glance



Access & Actionability

- Profile API, Query API, Insight API
- **C360 Profile dashboard***
- Streaming data & insight change detection
- Event trigger & notification
- Query federation service integration



Analytics & AI

- Calculated Insights - KPIs, Scores
- Advanced Calculation Framework
- Multi-Dimensional Data Views
- Tableau with Live Query
- Datorama Connector
- Tableau CRM with Live Query
- Machine Learning



Data Lake & Connections

- Schema on Read: hyper-scale, data-preserving
- Batch, Streaming & **Real Time Ingest**
- Connector to all Salesforce Clouds*
- Mulesoft connector (AWS, GCP, Azure)
- Data lineage

Reconciliation and Governance

- Flexible model & CIM support for data harmonization
- Identity Resolution (exact & **fuzzy/AI**)
- Transform library & error audit
- Control event / error notifications
- **Multi Profile Resolution**
- Data Permissions



Extensibility Ecosystem

- Appexchange packaging support for all features
- Metadata API
- Object API
- Create Segment & Activation API

Trust and Compliance

- ISO, SOC, HIPAA, GDPR, CCPA compliance
- L1-L4 consent model
- Data residency in AMER & EMEA
- **Data residency in APAC**

*Blue text indicates roadmap

Salesforce CDP Winter 2021 Release

Commerce, Mulesoft, Tableau and new AppExchange Partners!



Connect the Entire Customer 360

- Personalize with **Commerce Cloud Connector**
- Leverage your enterprise data with **MuleSoft Anypoint Connector**
- Tag once, capture anywhere with **Unified Webtag**

Make Data Real Time

- Compute **Streaming Insights** from real time engagement events
- Trigger flows and webhook actions easily with new **Data Actions** capability
- Build multivariable insights with **Calculate Insights Builder** (beta)

Get Smarter with Integrated Analytics

- Turn contacts into rich profiles with **Fuzzy/Multi Identity Match**
- Build smarter segments with **Einstein Engagement Scores**
- Explore data in Tableau with 1-click with **Tableau Fast Start Kits**
- Create embeddable dashboards with **Tableau CRM Live Connect**

Activate your Entire Vendor Ecosystem

- Empower ISV & Developer packaging with API-first **Data Kits**
- Supercharge your Google ecosystem data with **Google Cloud Storage connector**
- Enrich your 1st party data with **AppExchange Identity Enrichment** partners (Merkury, Epsilon)

Where Can I Learn More?

Check out these links to great resources!



Getting Started with a CDP



Data Illustrated



Gartner's Multichannel Marketing Hubs



State of Marketing Trends



Click the images above to access these resources!



Thank You

Salesforce CDP Editions

All Editions Include Marketing Cloud (Email Studio & Journey Builder)



Edition Level	Corporate	Enterprise	Enterprise Plus
UNIFIED PROFILES	45,000	500,000	500,000
SEGMENT PUBLISHES	20,000	100,000	100,000
ENGAGEMENT EVENTS	7.5 BILLION	25 BILLION	25 BILLION
SUPER MESSAGES	10 MILLION	150 MILLION	150 MILLION
ALSO INCLUDED:	Marketing Cloud Email & Journeys This CDP Edition includes the same Journey Builder features as the Marketing Cloud Corporate Edition. click here to see more information on MC Editions	Marketing Cloud Email & Journeys This CDP Edition includes the same Journey Builder features as the Marketing Cloud Enterprise Edition. click here to see more information on MC Editions	Marketing Cloud Email & Journeys This CDP Edition includes the same Journey Builder features as the Marketing Cloud Enterprise Edition. click here to see more information on MC Editions
	DOES NOT include Premier Support	DOES NOT include Premier Support	 Includes Premier Support

Implementation Services for CDP are highly recommended



ROI

Business Impact Guide

Benefits of the Salesforce CDP



Goals



Drive New
Customers



Revenue Growth
Customer LTV



Drive Business
Productivity

Salesforce Capabilities

- Trusted, Scalable, Reliable, Secure Platform. #1 Marketing Platform
- Consolidated Customer Profile Across the Business. Maximize Progressive's 1st party customer data in all communication efforts
- Centralized marketing intelligence to optimize paid and owned efforts for stronger data driven ROI
- Journey + Trigger based omni-channel communication hub (email, text, in-app push)
- Leverage built in AI-driven decisioning for 1:1 communication and orchestration of the customer experience across marketing + service
- Increase personalization in email, web, in-app, kiosk and offline channels
- Drive journey focused omni-channel transactional/payment communication for an increase in consistent flow of revenue
- Stronger connection between email and web with Google 360 connection

Business Benefits

↑ Convert New Customers

↑ Increase New Product Adoption

↓ Reduce Acquisition Cost

↑ Customer Retention

↑ Marketer Productivity

↓ IT Maintenance Costs

↑ Speed to Market

↑ Intelligent, Connected Solutions

Benchmarks

+25%

Increase in customers from marketing efforts

+22%

Increase in revenue from cross/up selling

-26%

Decrease in IT costs

+24%

Increase in calls deflected

+24%

Increase in conversion rate from marketing

+36%

Increase in business user productivity

+30%

Increase in overall marketing ROI

Business Impact of CDP



Salesforce CDP

Unified Customer Record

Integrate with external solutions or use native exact match identity resolution to connect data from Salesforce and external systems .
Customer Data Platform

Segmentation

A single interface to build audiences for marketing
Marketer-friendly; Precise targeting

Profile & Segment-Level Analytics / Insights

Visualize and understand data acquisition / retention
Enterprise-level control over 1P data

Activation & Personalization

Use unified profiles for targeted marketing campaigns
Personalized marketing engagements

Business Improvement

- Unify data into single Marketing record
- Manage Preferences & Consent Across Brands

- Segment in a single location
- Marketers no longer need to build SQL queries
- Segment across all Brand data

- More effective and better coordination Marketing across Brands
- Increase Marketer confidence in Data
- Test experiences quickly and launch more campaigns in less time

- More effective collaboration across the Business
- Leverage all RHI Data to drive personalization

Directional Benefits*



Revenue Increase

▲ Lead Conversion Rate

▲ Cross-Sell and Up-Sell

▲ Customer Retention



Productivity

▼ Time Spent on Campaigns

▲ Employee Productivity



IT Efficiency

▼ IT Maintenance Costs

+30%

Increase in Conversion

+18%

Increase in Retention

+36%

Increase in Marketing Productivity

-26%

Decrease in IT Costs

Business Impact of CDP



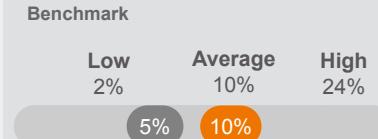
BUSINESS IMPACT



Increased Productivity & Efficiency



Increased Conversion



Increased Share of Wallet



Increased Retention



Speed + Security + Self Service

The foundation that provides marketers with a single location for self-serve segmentation across any set of data sources.

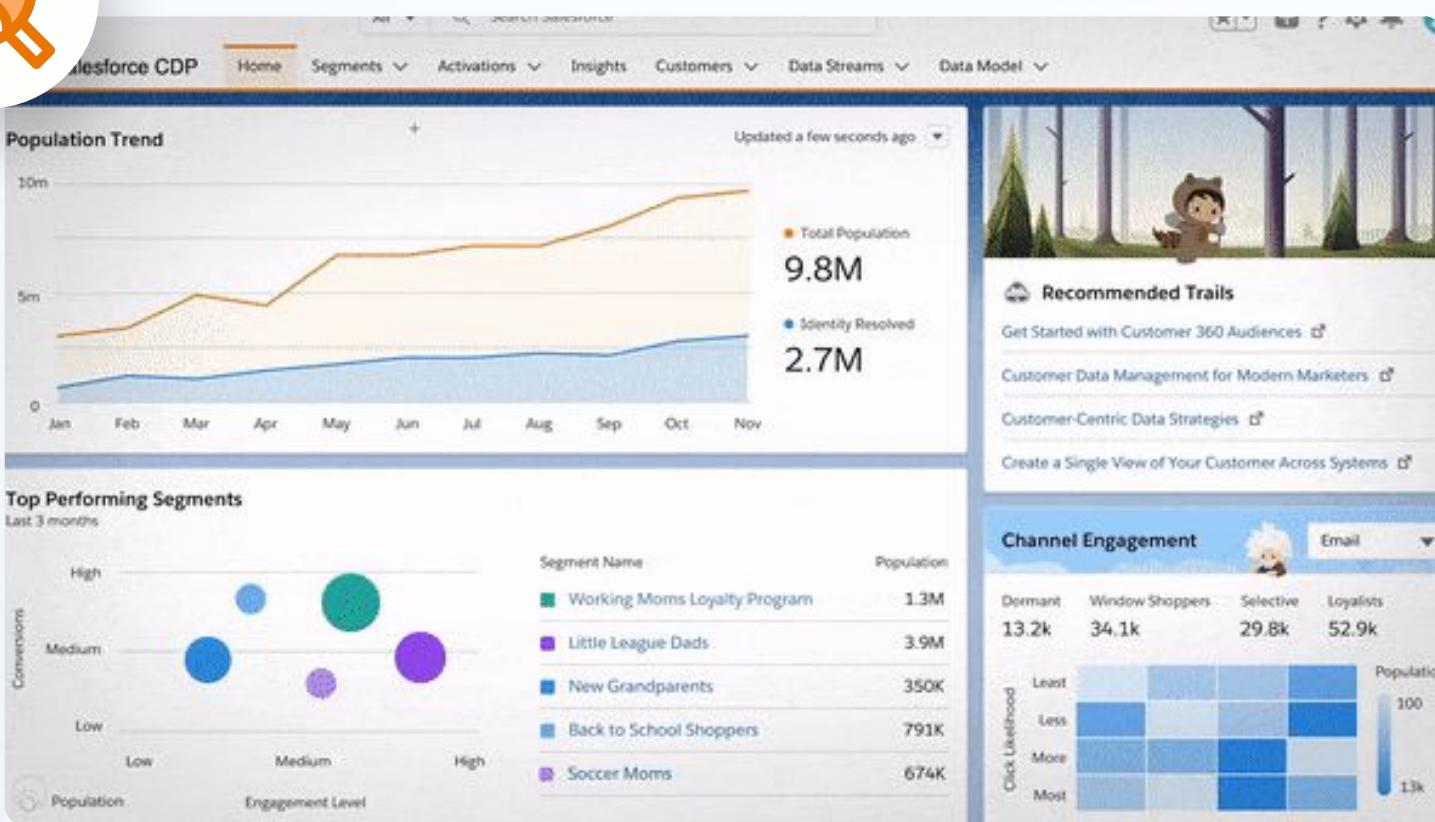


High Level Slides

For events, etc

Marketing Success From Anywhere

Make Data Smarter with Salesforce CDP, Built on the World's #1 CRM



Data from Anywhere

Advanced Data Access via MuleSoft - **NEW**

Smarter Segments

Enhanced Audience Segmentation - **NEW**

Salesforce CDP

Insight Enriched

Tableau Integration - **NEW**

Calculated Insights - **NEW**

Open Access

AppExchange Connectivity - **NEW**

Salesforce CDP

Make every marketing moment smarter with the power of unified data

Connect the Enterprise

Combine Sales, Service, Commerce, Marketing, and enterprise data to get a complete view of your customers. Seamless plug into Mulesoft and Tableau

Segment Smarter

Segments have gotten smarter with type-ahead functionality, plus AI that democratizes the power of big data analytics for marketers



Built on the #1 CRM

Build a Single Source of Truth

Create a unified customer profile across all touchpoints by connecting identities, engagement data, customer orders, loyalty, marketing journeys, and privacy management

Engagement Everywhere

Activate your customer data across any advertising, messaging, or engagement platform – from Marketing Cloud, to Commerce Cloud, and new AppExchange Partners