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SALESFORCE DATA CLOUD - CUSTOMER ENGAGEMENT

This Tableau Accelerator allows you to:

- **Assess the level of engagement of customers across the five channels:**
 - Direct Engagement (Sales)
 - Emails
 - Messages
 - Website
 - Push Notifications
- **Easily identify your customers' different levels of engagement:** from Very High to Very Low from Very High to Very Low
- **Customize your engagement levels to best match customers expectations**
- **Select the best channels to interact with your customers**
- **Create positive customer experiences to increase loyalty and retention**

This segmentation method can of course be customized.

Tips to adjust the dashboards as part of this accelerator

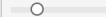
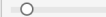
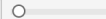
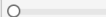
- All data sources are built using custom queries. You can edit them and add custom calculations.
- Some optional fields may not exist in your Org: in that case, the refresh will fail and you have to edit the query and add 'N/A' As "Field Name".
- You can reduce the number of records loaded to improve refresh performance by adding filters to the queries, for example to load only the last two years you can add a where clause like this: WHERE YEAR(WE."ssot__EngagementDateTm__c")>=(YEAR(CURRENT_DATE)-1)

Defining Engagement Levels

Each Engagement type (Direct, Email, Website, Message or Notification) is measured by a given engagement KPI you can select.

The levels of engagement (5 segments from "VERY LOW engagement" to "VERY HIGH engagement") are defined according to the following rules:

- The upper limit is defined by the value of the engagement KPI for the customer with the highest level of engagement
- The customers are then divided into 5 segments (each customer having an Engagement KPI value between 0 and this upper limit)
- The relative size of each segment is configurable by thresholds, which are defined as a percentage of the upper limit

VERY HIGH Engagement		
From 25% to	100%	of most engaged customer
HIGH Engagement		
From 15% to	25% 	  of most engaged customer
MEDIUM Engagement		
From 7% to	15% 	  of most engaged customer
LOW Engagement		
From 2% to	7% 	  of most engaged customer
VERY LOW Engagement		
From 0% to	2% 	  of most engaged customer