The Path to Unified Data Cloud Excellence:

Accelerating Innovation with CloudSmiths Salesforce Expertise

A CLOUDSMITHS GUIDE

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cloudsmiths

The **Evolving** Digital and Data Landscape

Today, more than ever before, the capacity to gather, understand, and utilise data is incredibly important for success. In our digital world, a flood of information pours into businesses from different sources, including CRM systems, online interactions, third-party data providers, and IoT devices.

The crux of the matter is not only bringing all this data together, but also understanding what exactly that data means and how to put it to good use. For one thing – improving interactions with customers.

This white paper details how Salesforce Data Cloud, backed by CloudSmiths' team of certified Data Cloud architects and consultants, provides a comprehensive solution by offering businesses the necessary tools to integrate their data, derive meaningful insights from it, and interact with customers on a more personal level.

What matters most to today's consumer?

We're in 2024 and the reality is that most customers prefer to do business with companies that genuinely understand them and can anticipate their needs. You have to know what they want before they do. They also want to engage with businesses on their terms and conditions and schedule.
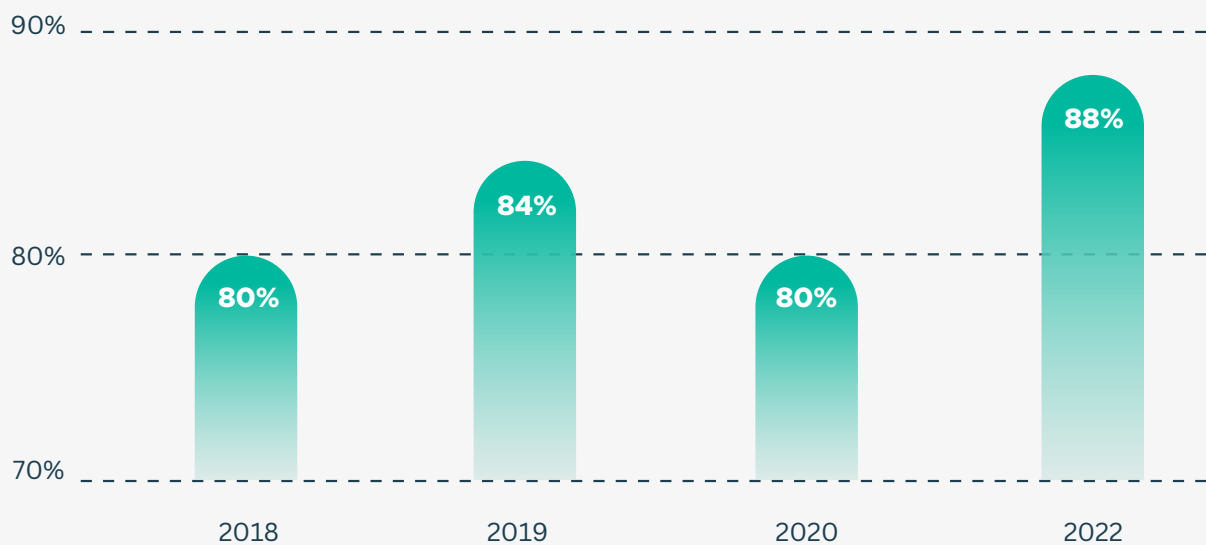
What this all boils down to is delivering a great customer experience.

88% of customers

say that **the experience** a company provides is just as important as its products or services.

Salesforce State of the Connected Customer, 2022

Customers who say the experience a company provides is as important as its product or services

90% -

88%

84%

80% - - - - - **80%** - - - - - - - - - - **80%** - - - - - - - -

70% -

2018   2019   2020   2022

Salesforce State of the Connected Customer, May 2022.

The issue is companies don't have many opportunities to get these experiences right. PwC's research shows that one in three consumers (32%) will walk away from a brand they love after just one bad experience.

So, how do you avoid these bad experiences? Leveraging data, of course.

Data is the key

to understanding your customers and your market.

It tells you who your customers are, whether they like what you're selling, and if your marketing is working. It also helps you track how much you're making and spending. Essentially, without data, you're left in the dark about your business's performance and direction.

That being said, it can be easy to get lost in all the data if you don't have the right tools to make sense of it. Organisations need a way to store, access, and interpret consumer data effectively, ultimately enabling them to use it to increase their sales.

The strategic role of Salesforce Data Cloud in modern business

Because there's an overwhelming amount of customer data being generated every day, and that data often sits in silos, it can be very difficult to use for meaningful or tangible outcomes, which also means businesses are more disconnected from their customers than ever before.

Now, in order not to become a business of the past, decision-makers are looking at their data and frantically trying to figure out how to extract it from various isolated systems that have been built up over the years. Their goal is to transform every touchpoint into an opportunity for connection. However, for that to happen, all the data needs to be collected and stored in a single location. This is where Salesforce Data Cloud comes in.

Data Cloud addresses the core challenge businesses face — freeing up trapped data and turning it into useful insights for CRM, AI, automation, and analytics across all touchpoints and channels.

Advantage? You can harness and leverage data for comprehensive business improvements.

Unveiling Data Cloud Excellence

Definition and significance of Data Cloud excellence

As we have now established, businesses can't keep their customers at the centre if they don't have all the data related to their customers in one place. Fortunately, Salesforce Data Cloud does just that.

Data Cloud is primarily a real-time data platform that centralises all this customer data from various sources, both internal and external, creating a unified and single source of truth for businesses.

Its story with Salesforce began back in 2020, when it was first introduced as Salesforce Customer 360 Audience.

Since then, it went through several name changes to reflect its shift in focus from solely marketing-oriented data to becoming a comprehensive, enterprise-wide data ecosystem.

2020

Introduction as Salesforce Customer 360 Audience.

2021

Rebranding to Salesforce Customer Data Platform (CDP).

2022

Transition to Marketing Cloud CDP and then Salesforce Genie.

2023

Final rebranding to Salesforce Data Cloud.

In 2021, Salesforce rebranded Customer 360 Audience to Salesforce Customer Data Platform (CDP), aiming to consolidate marketing data for enhanced engagement through personalised campaigns. This focus primarily benefited marketers, leaving other domains like sales, service, commerce, and industry-specific requirements less integrated.

In 2022, Salesforce CDP became Marketing Cloud CDP, and then – Salesforce Genie. Salesforce Genie was able to process data in real-time and gave businesses the ability to respond to customer needs and opportunities more quickly. It also used AI to generate insights and recommendations for businesses, which helped them to make better decisions about their customers and products.

Finally, in 2023, Salesforce adopted the name "Salesforce Data Cloud". What's so great about Data Cloud is that it combines all the features of Salesforce Genie with new data management capabilities. Businesses are equipped with a comprehensive set of tools for managing their data, including data ingestion, data quality, data governance, and data security.

Data Cloud drives Salesforce's GenAI innovation, which consists of AI-powered features designed to assist businesses in making better decisions and delivering personalised experiences to their customers.

Integrated into the Salesforce Platform, Data Cloud strengthens the overall Customer 360 experience, improving the functionality of all Salesforce clouds.

How **CloudSmiths leverages Salesforce Data Cloud for enhanced business outcomes**

At CloudSmiths, we're one of the biggest Salesforce partners in Africa, along with being implementation experts in Google Cloud, Microsoft Azure, AWS and Snowflake, among others.

We know that having reliable data for making business decisions eliminates uncertainty in operations and lets companies concentrate on proven strategies to enhance their business. We help organisations deploy Salesforce Data Cloud seamlessly within their existing infrastructure to enable them to gather data and transform it into valuable insights.

Transforming reliable data into valuable business insights and improved outcomes.

The right kind of reliable data can improve interactions with potential customers, prevent customer service problems, manage inventory efficiently, predict trends, spot profitable opportunities, and address design flaws – all of which directly help increase your profits.

Expert Insights:
A Q&A with Our Experts

We caught up with our Digital Transformation and Business Development Leader, Anton Kopytov, and Executive Head of Customer Acquisition, Phil Malcolm, to give you a sense of how Salesforce Data Cloud enhances CloudSmiths' development capabilities and gives us a competitive edge when it comes to creating solutions for our clients.

These experts also shared their opinions and insight on best practices for integrating Salesforce Data Cloud, preparing clients for upcoming market changes, and addressing a few security concerns.

Anton Kopytov

Head of MarTech and Data Products

Phil Malcolm
Executive Head
EMEA

Enhancing development capabilities

Salesforce's Data Cloud provides a vast repository of high-quality, third-party data that can be integrated seamlessly into CloudSmiths' development processes.

"By leveraging this data, we can enrich our solutions with valuable insights, improve predictive analytics, and personalise customer experiences. This enhancement empowers us to deliver more robust and innovative solutions to our clients, ultimately giving us a competitive edge in the market."

Phil Malcolm

Key considerations and best practices for customisation and integration

When customising and integrating Salesforce's Data Cloud into existing environments, Phil points out that it's important to consider factors such as data quality, relevance, and compliance with regulatory standards such as GDPR and CCPA.

> **Best practices include conducting thorough data assessments, defining clear integration objectives, and establishing robust data governance frameworks.**

Additionally, and this goes without saying, leveraging Salesforce's native integration tools and seeking expertise from certified Salesforce consultants can streamline the customisation and integration process, which will ensure seamless functionality and optimal performance.

Positioning clients for future technological shifts or market changes

"Salesforce's Data Cloud equips our clients with a wealth of actionable insights and intelligence, which enables them to adapt quickly to evolving technological shifts and market dynamics," says Phil.

"By leveraging real-time data and predictive analytics, clients can anticipate trends, identify emerging opportunities, and make informed strategic decisions."

It's worth mentioning that Salesforce also consistently innovates and remains committed to staying at the forefront of technology to ensure that clients remain well-positioned to embrace future advancements.

How does Data Cloud differ from other (traditional) CDPs available today?

"Unlike traditional CDPs that primarily focus on marketing data, Salesforce Data Cloud is engineered to integrate data across all enterprise domains, including sales, service, and commerce" **– giving you a unified view of the customer across the organisation.**

Anton Kopytov, Digital Transformation and Business Development Leader

"Another differentiator is AI and Machine Learning at Salesforce Data Cloud Core - embedded with Einstein AI. Salesforce Data Cloud provides predictive analytics and automated insights that go beyond the capabilities of many traditional CDPs."

How safe is companies' data with Salesforce Data Cloud?

Well, as the world's number one CRM, Salesforce certainly places a high priority on data security, with robust encryption, comprehensive compliance frameworks (including GDPR and CCPA, as Phil also mentioned), and granular access controls.

Salesforce employs advanced threat detection and monitoring capabilities to proactively identify and mitigate security risks.

"These measures guarantee that customer data is kept safe, protected, and compliant with global privacy regulations, making Data Cloud a trusted platform for data management," says Anton.

How does CloudSmiths stay abreast of emerging trends and advancements within Salesforce Data Cloud?

CloudSmiths has a team of certified Data Cloud architects and consultants who are experts in their field and are continually updating their skills and knowledge. We also actively participate in key Salesforce events, such as Dreamforce, which are vital for gaining insights into new features and best practices.

Then, we also make sure to stay up to date by:

✓ Closely following the latest from Salesforce

✓ Testing out new features with our customers to fine-tune them in real-life scenarios

✓ Jumping into discussions on the Trailblazer Community platform helps us share some ideas, find solutions, and stay connected with the wider Salesforce community.

Overcoming Common Data Challenges

Identifying prevalent data management hurdles

Challenge 1

Synchronising multiple data sources

Challenge 2

Data that isn't useful

Challenge 3

Data Security and Protection

Since data is considered the most valuable asset in driving business growth and excellence, naturally, managing it effectively is non-negotiable for today's data-driven organisations. Effective data management offers valuable insights into customer behaviour, market trends, and operational efficiencies, which can give your company an edge over the competition.

What's also important to realise is that simply implementing one aspect of a data management program isn't sufficient for your business to excel. Accurate, timely, and relevant data – for instance – is vital for decision-making at every level of the organisation.

That said, effective data management is easier said than done.

Let's take a closer look at some of the most **pressing challenges** businesses face when it comes to managing their data.

01

Challenge #1: Synchronising multiple data sources multiple data sources

The main conundrum for data-driven organisations is keeping different systems in sync. For business intelligence to be effective, the data it relies on must be of high quality.

Issues like time zone differences, network delays, different date and time formats, data migration challenges, integration issues, and compliance requirements can all cause discrepancies in timestamps, errors in data interpretation, and inconsistencies in reporting.

For real-time or near-real-time updates, it is important to consistently input data into the system promptly, reliably, and with accuracy. If you generate a report at the start of the month but only have half the data available, the report will be inaccurate.

02

Challenge #2: Data that isn't useful

Non-useful data can be detrimental to a company's operations. Even if you have sophisticated data management systems in place, if your team struggles to access and utilise the data effectively, it completely loses its value.

This non-useful data usually includes information that is outdated, irrelevant, or inaccurate. When decision-makers can't rely on the data to provide clear insights, it will most likely lead to errors in judgement and hinder the company's overall efficiency.

In other words, if the data isn't presented in a way that answers important questions and provides meaningful insights to the right people, it can't help you make informed decisions or improve your business's performance.
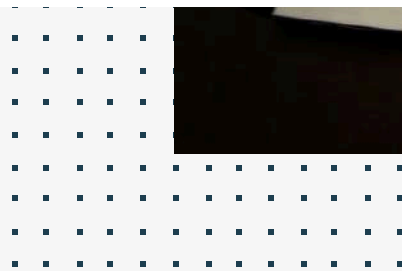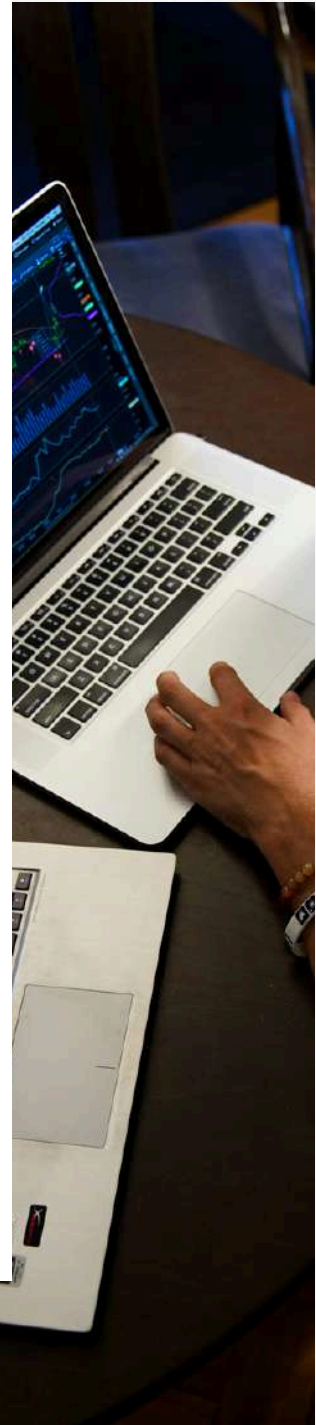
03

Challenge #3: Data security

We all know that data usually contains sensitive information that, if accessed without permission, can lead to harm, embarrassment, or discrimination for a company or individual. And these security issues typically stem from how data is stored and managed.
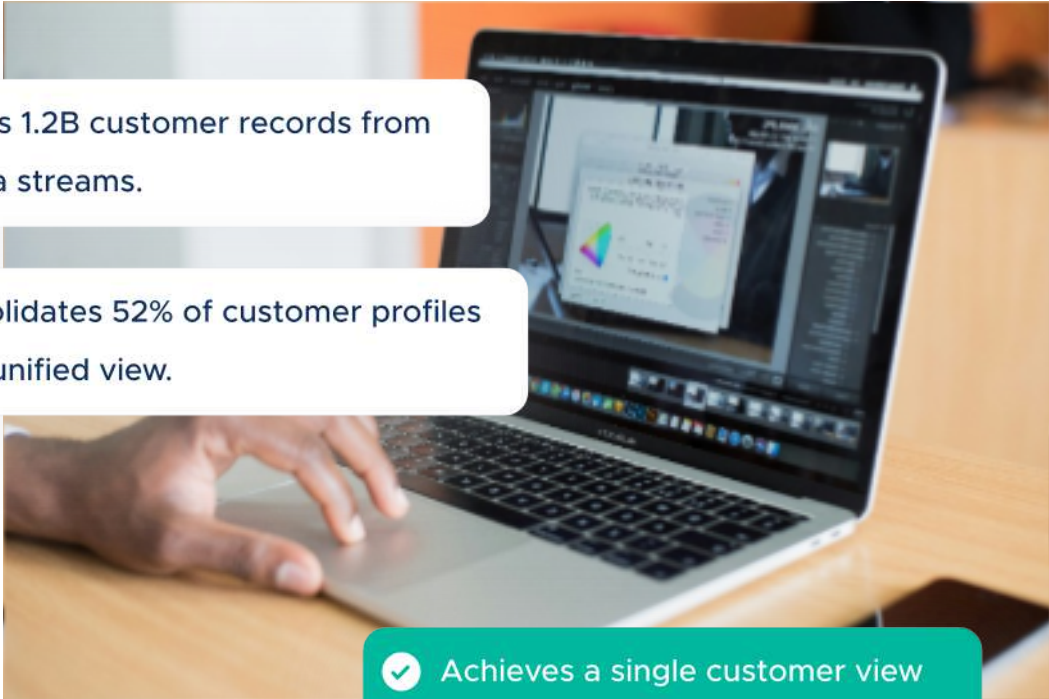
Here are some <u>statistics</u> to lose sleep over:

✓ In 2021, data breaches increased by 175%, with an average size of 535 terabytes.

✓ Between March 2021 and February 2022, data breaches compromised 42 million records.

✓ In 2022, the average cost of a security breach rose to $4.34 million, marking a 2.6% increase.
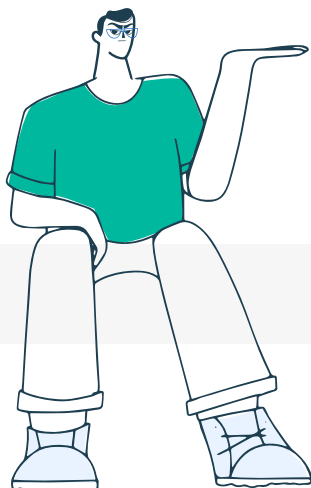
These numbers once again just show how important it is to take the risks of poor data management practices seriously.

How CloudSmiths' strategies and solutions using Salesforce Data Cloud address these challenges

Accesses 1.2B customer records from 60+ data streams.

Consolidates 52% of customer profiles for a unified view.

Achieves a single customer view through data consolidation.

They're able to solve businesses' most frustrating data management challenges by providing access to a meticulously curated database of verified and consistently updated information.

With Salesforce Data Cloud – implemented with the assistance of CloudSmiths – businesses can ensure their data remains current, reliable, and useful for making well-informed decisions.

Here are the top 5 things that Data Cloud enables businesses to do:

1 It consolidates data from sales, marketing, service, and commerce into a single, real-time platform, enabling a 360-degree view of the customer journey.

2 With integrated data and a 360-degree view of consumers and customers, businesses can make informed decisions instantly and respond to customer needs, market changes, and operational demands as they happen.

3 Leveraging AI and machine learning, Data Cloud predicts customer behaviours and automates personalised interactions, which enhances engagement and optimises customer experiences.

4 It fosters seamless collaboration across different departments and teams, which facilitates the sharing of insights and intelligence to drive unified strategies and actions.

5 Clients can scale their operations more efficiently with Data Cloud, adjusting data processing capabilities and storage as their business grows – without the need for extensive infrastructure overhauls.

Spotlight on Industry Success: Financial Services and Retail

Transformative Impacts of Salesforce Data Cloud in Financial Services

Salesforce Data Cloud is incredibly beneficial for banking institutions since it brings together customer data from different sources in one place. It allows banks to centralise customer and engagement data, which creates a comprehensive Customer 360 view.

This way, teams are able to gain a much deeper understanding of each client's financial journey and improve their Know Your Customer (KYC) processes.

Salesforce Data Cloud unifies customer data, delivering a complete Customer 360 view and enhancing KYC processes.

Salesforce Data Cloud also facilitates the use of propensity scores, engagement analyses, and sentiment assessments, which are not only made possible but also easily accessible – empowering banks and credit unions to personalise their offerings and interactions for their customers.

Leveraging Salesforce Data Cloud, financial institutions can automate their operations, ensure compliance with regulations, and most importantly, elevate their overall customer experiences. This positions them at the forefront of data-driven innovation in the financial sector.

✓ Enhances Personalisation

✓ Automates Operations

Elevates Customer Experience ✓

Innovations in retail customer engagement through Salesforce Data Cloud

Nobody is a fan of cold, impersonal customer service. Smart retailers understand that building healthy customer relationships all comes down to treating each customer as an individual.

Like in other industries, Salesforce Data Cloud provides a single platform for retailers to store and manage all their customer information.

This includes data from online and offline sources, as well as from third-party sources like social media and loyalty programmes.

Treating each customer as an individual is the only way to engage, retain, and grow customer loyalty.

Using Salesforce Data Cloud, retailers can build a comprehensive profile of each customer and capture details such as demographics, buying patterns, loyalty activity, and interactions with customer support to provide more personalised experiences across all touchpoints.

81% of customers

look up products online before buying them.'"

GE Capital Retail Bank

With this in mind, retailers can leverage Data Cloud to pinpoint customers who have extensively researched certain products or abandoned their shopping carts, and then, send them personalised emails to encourage these customers to return and finalise their purchase.

It's also worth mentioning that CloudSmiths can help retailers integrate Data Cloud with other Salesforce products such as Marketing Cloud and Commerce Cloud to expand the capabilities of personalised marketing and increase e-commerce sales in the long run.

CloudSmiths Salesforce Data Cloud Workshops

It can be difficult to know where to start with Salesforce Data Cloud, which is why CloudSmiths is excited to present a half-day workshop designed to help you harness the potential of your unique data through a personalised Data Cloud strategy.

Our expert facilitators will give you an up-to-date overview of Salesforce Data Cloud and then explore in detail how this technology can address your business's specific challenges and how your team can capitalise on opportunities.

# Who should attend these workshops?

Leaders that:

- Want to know their customers inside and out to personalise each interaction.
- Need to understand their data better to grow and innovate.
- Aim to make their teams nimble and responsive to market changes.
- Are looking to simplify complex systems and launch new projects faster.

What you'll gain:

- We'll work together to explore your data and identify hidden sources and break down barriers that may be holding back your performance.
- We'll address specific data challenges you're facing, including quality or accessibility, as well as answer any other burning questions you may have.
- Learn effective strategies for consolidating your data onto a single platform using Data Cloud and collaborate on creating a roadmap for success.
- Find out how a unified data platform can transform your business by personalising customer experiences, engaging audiences, and streamlining sales operations with data-driven insights.
- An in-depth look at exactly how Data Cloud uses AI to help your business, turning data into actionable insights and facilitating intelligent prediction and data-driven decisions.
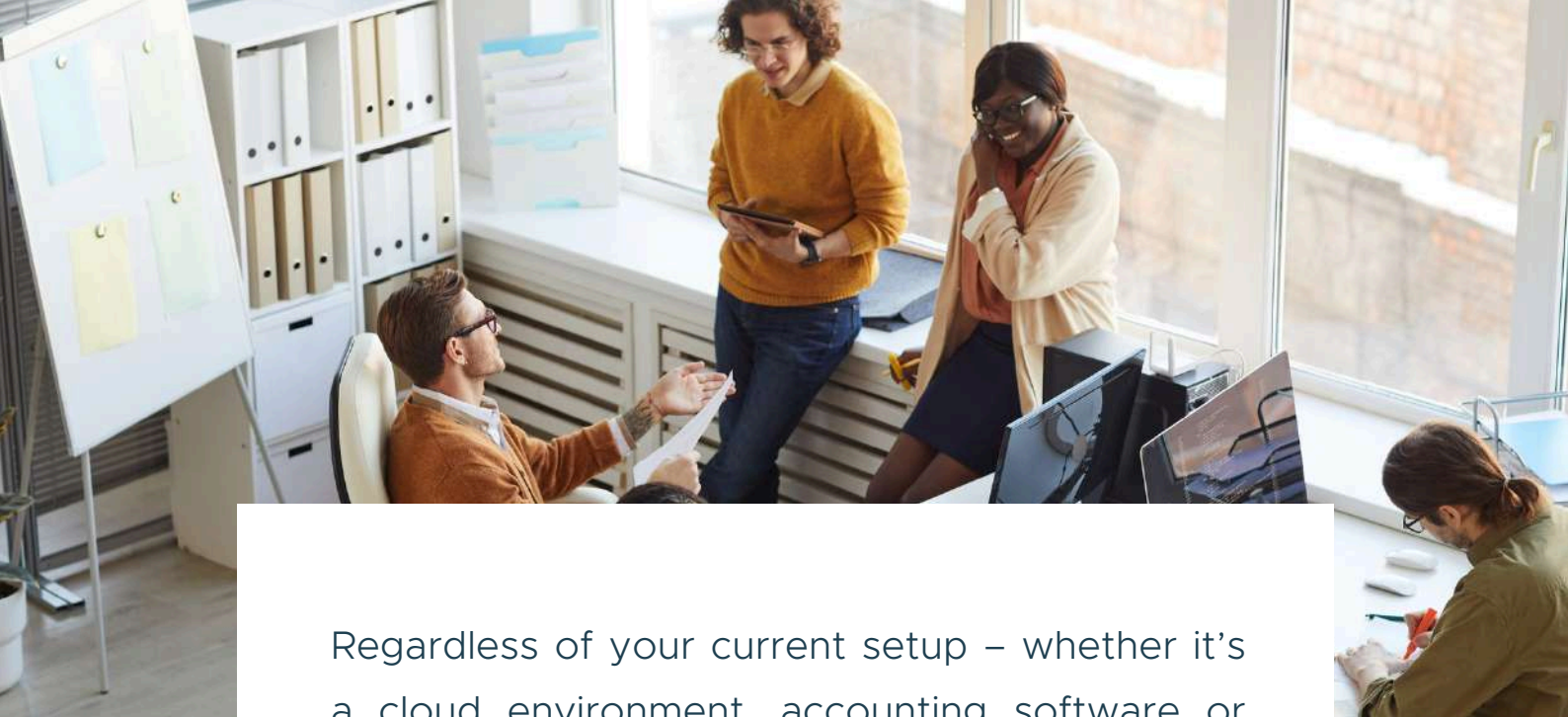
Regardless of your current setup – whether it's a cloud environment, accounting software or service desk solution – we will demonstrate how Data Cloud seamlessly integrates with your existing tools to provide a unified view of sales, marketing, and service.

This will be a safe space to ask questions, make a few mistakes, share experiences, and learn from the absolute best in the industry. Leave our workshop with a clear action plan and the knowledge to turn your data into a strategic advantage.

Future Trends in Data Management Powered by AI

Industries across the board are undergoing transformations like never before, with AI becoming increasingly central to data management across a number of sectors, including healthcare, finance, manufacturing, and marketing.

Businesses that want to remain relevant and keep up with what customers want, must stay updated on AI-driven data management trends.

Here are a few potential trends on the horizon:

1 The **data lakehouse,** which combines the flexibility of data lakes with the management strength of data warehouses, is incredibly important for managing vast data growth and diverse analytics needs.

2 As advanced technologies such as generative AI emerge, there's a growing emphasis on improving **data privacy and security measures.**

3 Tech such as **Natural Language Processing (NLP) and Automated Machine Learning (AutoML)** are making complex data more accessible and decipherable.

4 More and more businesses will be using **automation in data analytics** to manage large data volumes and make quicker, data-driven decisions.

5 The push for data democratisation aims to **make data accessible** to everyone within organisations, using tools that are user-friendly.

6 Businesses will continue to focus on **keeping data accurate, consistent, and secure** through frameworks and practices to maintain trust in data analytics.

In Conclusion

It's our hope that you now have a good understanding of what exactly Salesforce Data Cloud is (and what it isn't) and how this real-time data platform can enhance your customer experiences while making your business more profitable.

To fully leverage the benefits of Salesforce Data Cloud, though, you need to have the right support in place to develop a strategic implementation plan. With eight years of partner experience and a track record of success, CloudSmiths can help your team identify initial use cases that will deliver the ROI you're seeking in today's environment.

As Africa's most experienced Salesforce partner, we understand the nuances of Salesforce Data Cloud. Let us help you implement it effectively, ensuring that you get the absolute most out of the platform and drive meaningful results for your business.

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