

Unlocking the Salesforce data cloud opportunity

We help you monetize data to
deliver AI-driven customer and
employee insights

brillio



The Why

Unlock the power of Salesforce Data Cloud to elevate customer experience and unlock employee productivity.

In today's digital landscape, despite substantial investments in digital transformation and AI targeted at customer experience and productivity, organizations often find their progress hindered by the lack of connected data. The challenge lies in bridging the gap between insights in siloed digital systems. There is a need for a 'digital glue' that can orchestrate experiences across these siloed digital systems of engagement and systems of record. An ideal digital glue should be able to build a 360-degree view of core enterprise entities and activate the data in those critical systems of engagement without substantial engineering effort, thus bridging the last-mile problem in delivering ROI from CX and productivity investments.

When leveraged with other critical offerings from the ecosystem, the Salesforce data cloud product, such as Einstein One, Flows, and MuleSoft, offers a unique opportunity to build a digital glue for the enterprise. To address this opportunity, you need a partner who:

- Identifies your highest CX and employee productivity opportunities.
- Makes the right architectural choices to proactively address data quality, replication, or data governance risks and cost escalations.
- Leverages data for Responsible AI.

- Drives consistent insights and experiences **across your Salesforce clouds**.
- Delivers AI-driven insights to **whom it matters, when it matters**.
- **Eliminates wait time** to get on a data warehouse backlog.
- **Reduces** the complexity of **data fragmentation**.

The What

Comprehensive methodology to enhance CX, drive revenue growth, and reduce costs.

Our comprehensive suite of data cloud solutions is designed to propel your organization forward swiftly and securely. With our starter package offerings, we collaborate with our clients to:

- Prioritize suitable data products that build the highest ROI with a 360-degree view of various enterprise entities.
- Unblock and ensure data readiness by addressing initial data quality, data ops, and governance challenges.

Our value accelerators span industries, driving tangible business outcomes as follows:

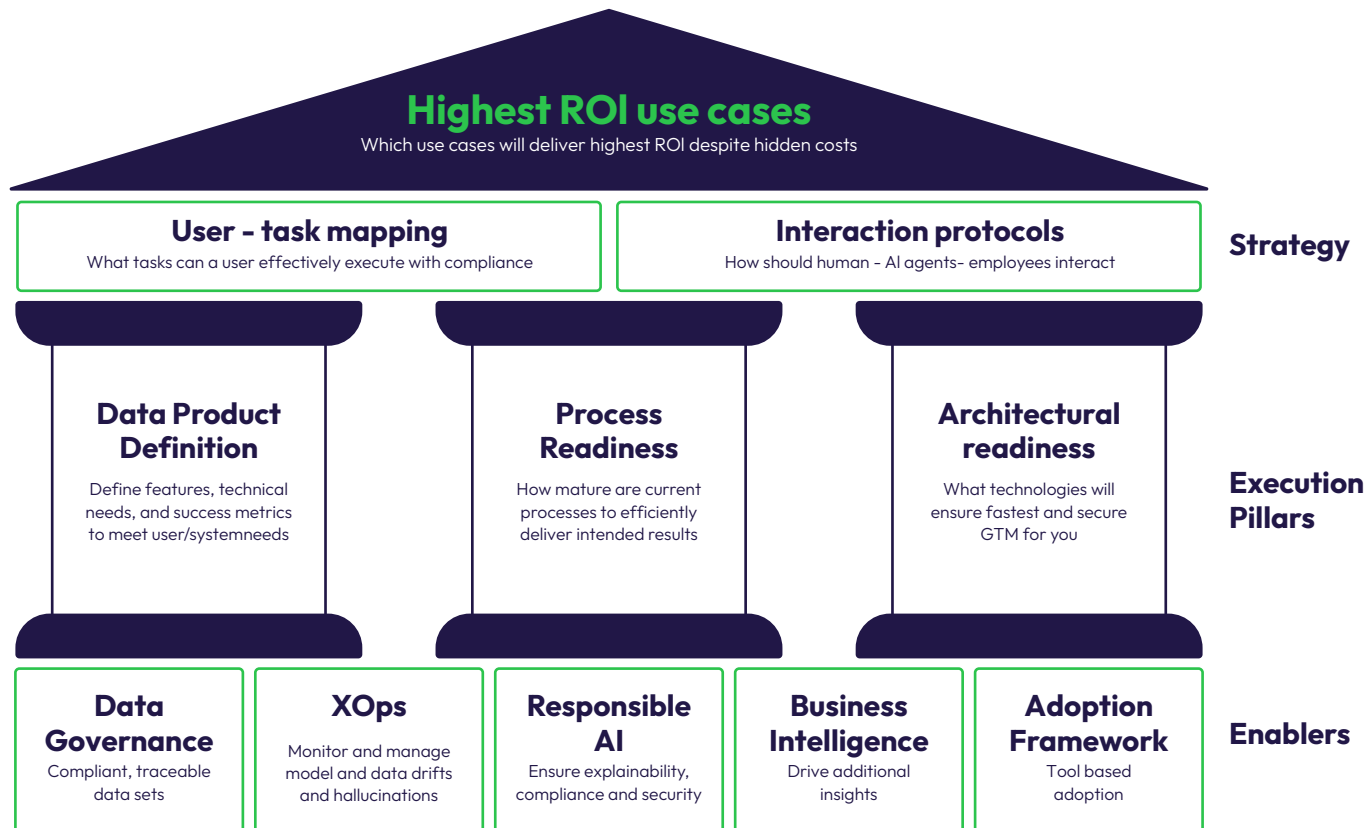
- **Intelligent communication hub:** Unified, simplified, and well-orchestrated customer outreach across marketing, customer service, and product teams.
- **Marketing experimentation co-pilot:** Empower marketers with a data-driven hypothesis to increase campaign effectiveness using a holistic customer data platform.
- **AI-enabled customer service:** Deliver personalized omnichannel customer service with AI-driven tools to improve agent productivity.
- **Deal desk transformation:** Simplify deal desk processes to improve deal velocity win rate and enable personalization for B2B clients.
- **CDP and data activation:** Integrate customer data from multiple sources and activate them to deliver personalized experiences for users.

Mitigating risks is paramount, and we achieve this through Responsible AI, DataOps frameworks, and data security accelerators. Strategic partnerships with industry leaders like Copado and Insights Board further enrich our offerings, ensuring a holistic approach to execution excellence and proactive change management.

- **Right start:** Data product definition and roadmap and data readiness assessment
- Leverage **value accelerators** to drive results across domains
- **Risk mitigation accelerators** for responsible AI, data ops, and data security
- Other **relevant partnerships** to drive holistic innovation: Copado and Insights Board

The How

Accelerate execution and mitigate risks with data cloud integration essentials.



- Determine highest ROI use cases
- Assess process readiness
- Ensure a robust architectural foundation
- Enroll in a 6-week program to get started

Getting started with Salesforce Data Cloud

← WEEK 1 and 2 → ← WEEK 3 → ← WEEK 4 → ← WEEK 5 and 6 →

| Determine right use cases | Use case prioritization | Determine data sources and assess readiness | Define technology architecture and roadmap |
|---|--|--|--|
| <p>Determine key business objectives and challenges to be addressed through the data cloud solution.</p> <p>Establish key metrics or guardrails to be impacted.</p> <p>Conduct user interviews and workshops with stakeholders to determine:</p> <ul style="list-style-type: none"> • User personas • Customer journeys • Right use cases mapped to journeys | <p>Create backlog of use cases.</p> <p>Identify out-of-the-box vs custom use cases.</p> <p>Establish a prioritization framework:</p> <ul style="list-style-type: none"> • Effort vs impact matrix • Feasibility evaluation • Dependency mapping • Potential ROI <p>Rank and score use cases.</p> <p>Align on final list of prioritized use cases with business stakeholders.</p> | <p>Define the right data products (e.g., Franchise 360).</p> <p>Analyze data ingestion or data exchange needs.</p> <p>Determine the right sources of data for prioritized use cases.</p> <p>Data quality, testing, and validation to understand the state of data and need for data preparation.</p> <p>Assess data governance and security.</p> | <p>Analyze current implementation and architecture including the Salesforce ecosystem.</p> <p>Design the architecture to support prioritized use cases.</p> <p>Determine integration or changes to existing Salesforce user flows.</p> <p>Finalize Salesforce data cloud implementation roadmap.</p> <p>Establish an operating model with Salesforce and data teams.</p> |

Client success stories

Unified intelligent member outreach for a leading Fortune 500 Healthcare payer in the US

The client faced challenges in member engagement due to disjointed communication across channels. Brillio proposed a robust Salesforce data cloud solution to unify member data across various systems to address this. This system enabled the proactive shaping of member experience through personalization and omnichannel marketing orchestration and improved marketer productivity by empowering them with intelligent member insights.

AI-enabled customer service to improve agent productivity for top global financial institution

Brillio built a solution using Salesforce Data & AI Cloud features, such as an Einstein conversational bot for customer self-service, automated case summarization for agents, and intelligent knowledge article recommendations to address the client's need to improve agent productivity. The solution streamlined repetitive tasks with macros and provided agents with intelligent insights via Einstein Co-pilot, while managers benefited from a comprehensive performance tracking dashboard.

Streamlining order management for an asset management software provider

The client had a manual inquiry-tracking process that impeded their ability to address increasing sales and order-related inquiries in a timely manner. Brillio ideated a co-pilot solution to accelerate inquiry resolution and improve agent productivity through automated email generation. Once we invoked the Salesforce co-pilot module, it provided centralized access to all the contract and order-related information, helping agents respond to client inquiries while Einstein AI helped automate responses to inquiries.

Enhancing franchise performance for a leading multinational hospitality company

The client wanted to maintain brand quality and consistency in experience across its franchises. Brillio proposed the integration of the Salesforce data cloud to unify fragmented data across franchises, thereby improving efficiency in brand operations by empowering quality managers with real-time insights on QA and PIP progress and helping franchises with levers used by their peers for quality control and customer experience.

Brillio

Your partner-of-choice for Salesforce Data Cloud

We possess deep expertise in every facet of data cloud offerings, making us the trusted partner for navigating the complexities of modern data integration and getting the most value out of your data investments. Our journey begins with a thorough assessment of your organization's data landscape, where we uncover insights, identify challenges, and tailor strategies to suit your unique needs. Focusing on precision and innovation, we ensure a solid foundation for success through meticulously crafted starter packages and value accelerators that drive tangible business outcomes across industries. Mitigating risks is paramount in our approach, as we employ responsible AI practices, robust DataOps frameworks, and stringent data security measures to safeguard your data integrity. Moreover, our commitment to transparency and efficiency is evident in our six-week assessment process, which provides actionable insights and a clear roadmap for implementation. At Brillio, we go beyond promises, delivering results with precision, efficiency, and an unwavering commitment to your organization's growth journey.

6-week program

- Unlock value by consolidating data across silos.
- Leverage a suite of starter packages, value, and risk mitigation accelerators.
- A thorough assessment to determine highest ROI use cases and data readiness.

ABOUT BRILLIO

Brillio is one of the fastest growing digital technology service providers and the partner of choice for many Fortune 1000 companies seeking to turn disruption into a competitive advantage through innovative digital adoption. We help clients harness the transformative potential of the four superpowers of technology: cloud computing, Internet of Things (IoT), artificial intelligence (AI) and mobility. Born digital in 2014, we apply our expertise in customer experience solutions, data analytics and AI, digital infrastructure and security, and platform and product engineering to help clients quickly innovate for growth, create digital products, build service platforms, and drive smarter, data-driven performance. With 17 locations across the U.S., the UK, Romania, Canada, Mexico, and India, our growing global workforce of nearly 6,000 Brillians blends the latest technology and design thinking with digital fluency to solve complex business problems and drive competitive differentiation for our clients. Brillio has been certified by Great Place to Work since 2021.



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