

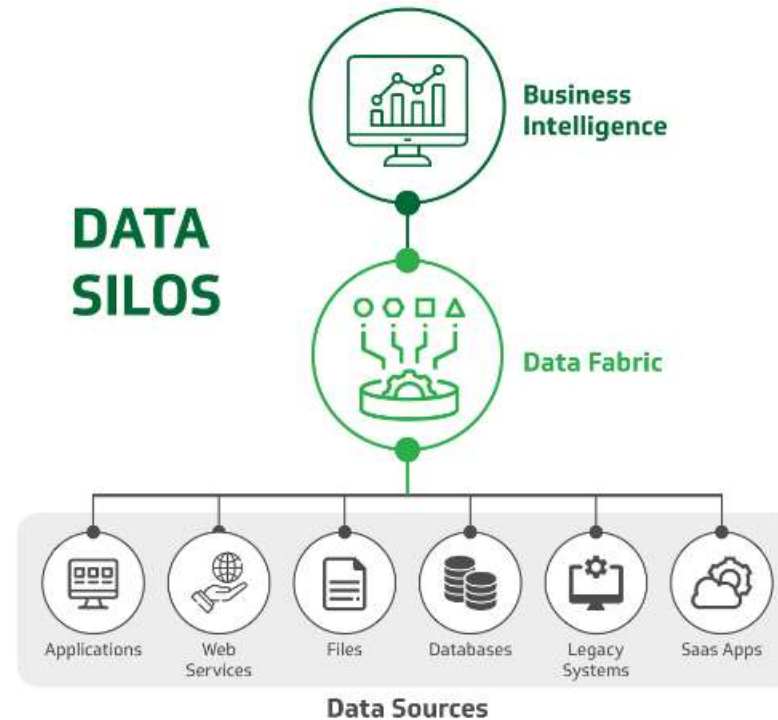
# Implementing Salesforce Data Cloud for a Unified Customer View



# Our Strategy for Resolving Client Issues

## Data Silos

Customer data scattered across CRM, e-commerce, marketing, and customer service systems hindered a single, accurate view.

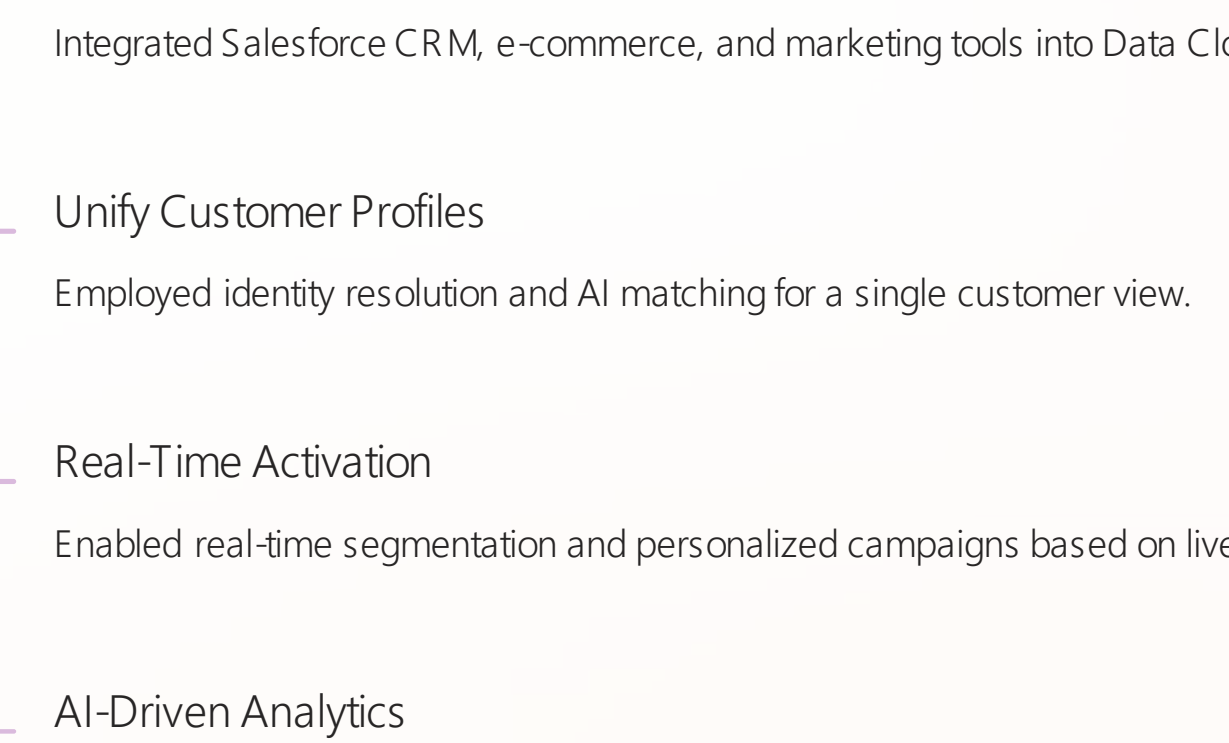


## Inconsistent Profiles

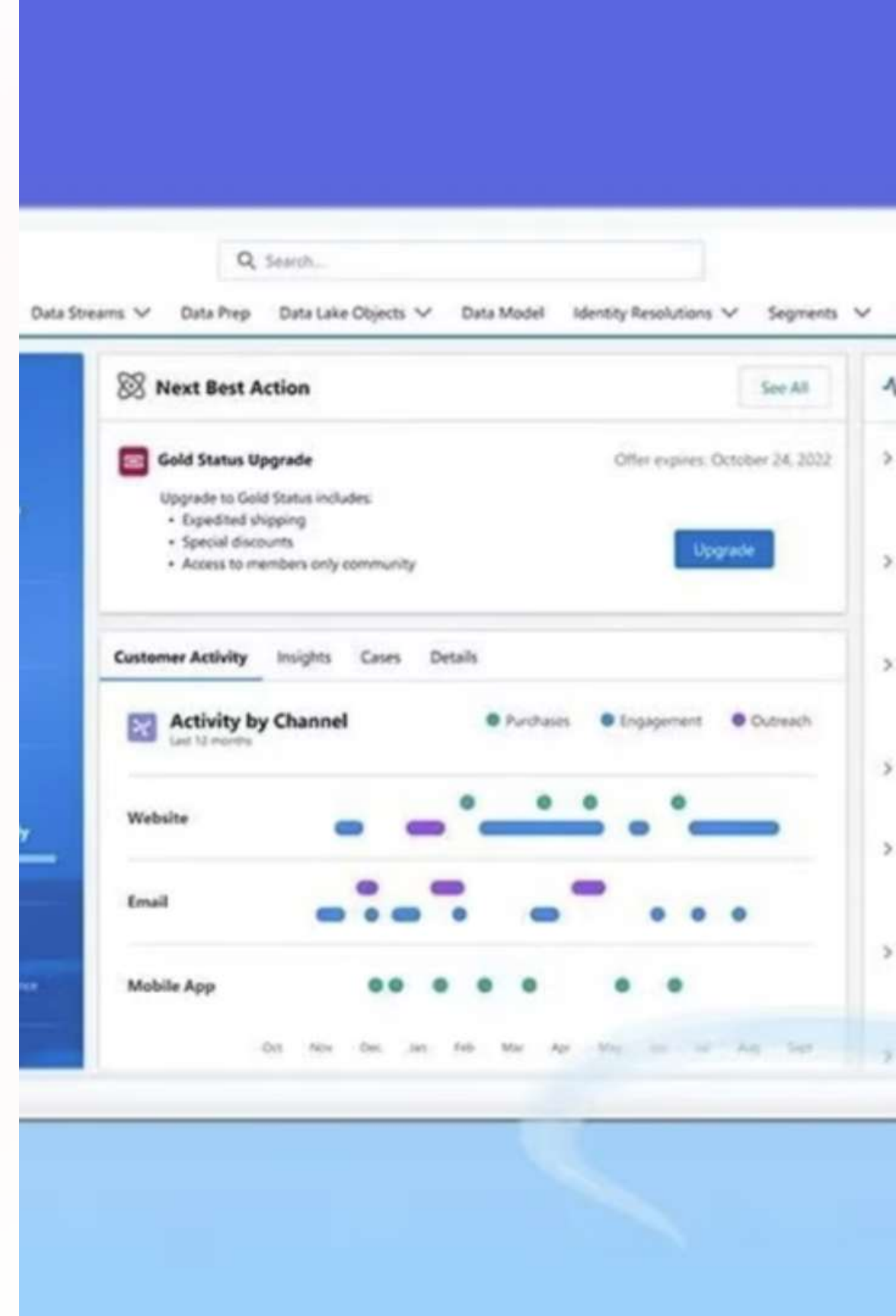
Duplicate and incomplete records across platforms led to ineffective and misdirected marketing campaigns.

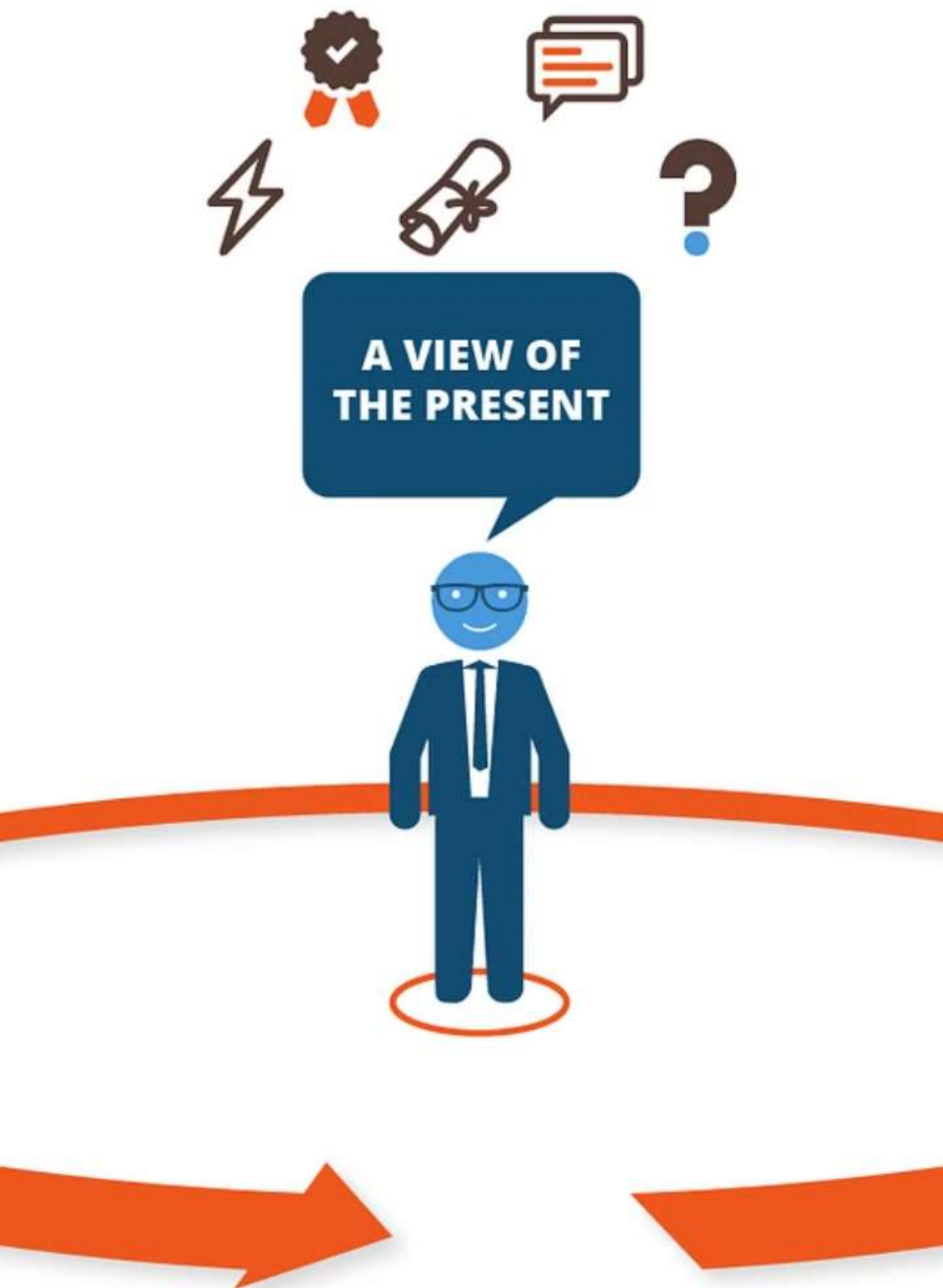
The client faced significant challenges in managing customer data, which was fragmented across multiple platforms. This resulted in inconsistent customer profiles and a lack of personalization, impeding their ability to deliver targeted marketing campaigns and personalized customer experiences. Without a unified view, it was difficult to make data-driven decisions and optimize business strategies.

# Optimizing Sales Efficiency

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- 1** **Connect Data Sources**  
Integrated Salesforce CRM, e-commerce, and marketing tools into Data Cloud.
  - 2** **Unify Customer Profiles**  
Employed identity resolution and AI matching for a single customer view.
  - 3** **Real-Time Activation**  
Enabled real-time segmentation and personalized campaigns based on live behaviors.
  - 4** **AI-Driven Analytics**  
Leveraged Einstein AI for predictive insights, segmentation, and trend analysis.

We implemented Salesforce Data Cloud to address these challenges. The solution involved connecting various data sources, unifying customer profiles using AI, enabling real-time data activation for personalized campaigns, and leveraging AI-driven analytics for predictive insights. This holistic approach ensured a comprehensive and actionable view of the customer.





# 360-Degree Customer View: The Foundation for Enhanced Decision-Making

## Single Customer Profile

A consolidated, accurate, and real-time profile for improved decision-making across the organization.

## Improved Insights

Access to comprehensive customer data enabled deeper understanding of behaviors and preferences.

## Better Collaboration

Unified data facilitated better collaboration and communication across different business units.

The implementation of Salesforce Data Cloud provided a 360-degree customer view, which became the foundation for enhanced decision-making. With access to a single, accurate, and real-time customer profile, teams across the organization could make informed decisions, leading to improved insights, better collaboration, and more effective strategies.



## Tangible Outcome: Enhanced ROI and Faster Resolution

30%

Increase in Marketing ROI

Improved segmentation and personalization resulted in higher engagement and conversions.

40%

Faster Customer Service

Unified data allowed support teams to access complete customer history instantly.

25%

Improvement in efficiency

Automation and improved workflows led to significant time savings in customer service.

The implementation of Salesforce Data Cloud yielded significant results. The client experienced a 30% increase in marketing ROI due to improved segmentation and personalization, as well as a 40% faster customer service resolution time thanks to unified data access. These quantifiable results demonstrate the tangible impact of a well-executed data unification strategy.

# Key Takeaways and Next Steps



## Data Unification

Essential for a comprehensive customer view.



## Personalization

Drives engagement and marketing ROI.



## AI-Driven Insights

Enhance decision-making and predict trends.

Salesforce Data Cloud enables seamless data unification, improved customer engagement, and more effective marketing strategies. Key takeaways include the importance of data unification, the power of personalization, and the impact of AI-driven insights. The next steps for businesses involve assessing current data infrastructure, identifying key data sources, and implementing a data unification strategy to drive better business outcomes. This case study demonstrates the transformative potential of Salesforce Data Cloud in unifying customer data and driving business growth.



Thank  
You