salesforce
Resilient Trailblazers, Together
Laura Martella
Service Cloud Account Executive
lmartella@salesforce.com
cell. 3427671426
Shakil Kamran
Arkus
Sasha Manford
Carl Marks Advisors

THANK YOU
salesforce
Trail Blazer
EXPLORER
ADVENTURER
HIKER

Agenda

- Resilient: what it means?
  - https://wall.sli.do/event/dnoblu6g?section=49bcdc5d-a803-497f-baa9-e0a1569e20da
- Salesforce Value
- Customer 360
- Innovate to be challenging
- Resources and Success Story

Shared Values Among Stakeholders

Trust

Build trusted relationships with stakeholders

Deliver highly secure and available infrastructure

Customer Success

Focus on customer success to drive mutual growth

Innovation

Empower Trailblazers with technology to drive customer success

Equality

Respect and value a diversity of people

Creating a Better World

1-1-1 Model

5M+
Hours

$350M+
Grants

51K+
Non-profits

SUSTAINABLE DEVELOPMENT GOALS

$90M Public education

$12M Equal pay

1M jobs "Pledge to America's Workers"

Net-zero Emissions

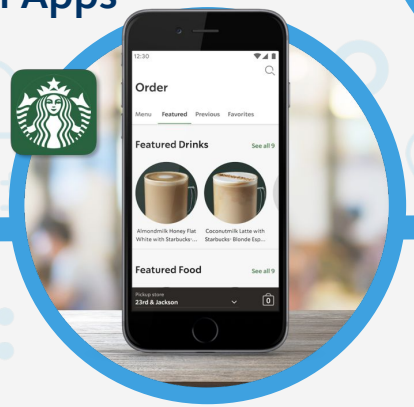
100% Renewable energy by 2022

Companies Need More Than Technology To Succeed

Digital Imperative: Moving Faster than Ever Before

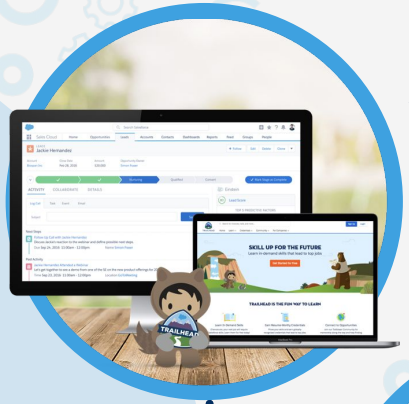
Shift to Digital Channels

Importance of Digital Apps

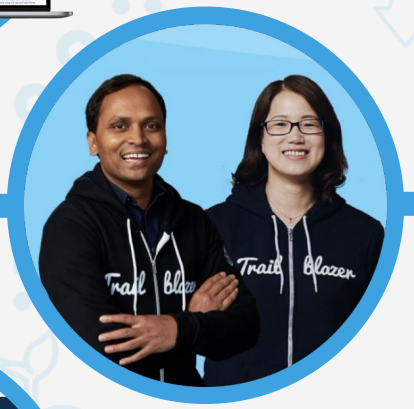


The Digital Customer

Support for Digital Employees

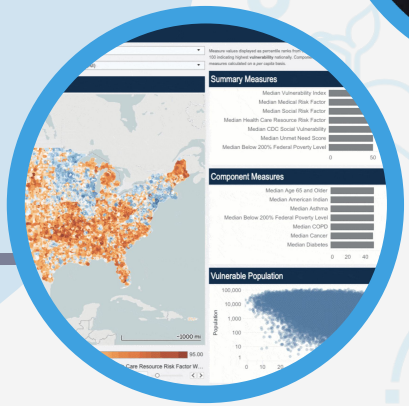


Growth of Digital Communities



Rise of Digital Communication

Making Digital Decisions



We're in the Midst of an Unprecedented Crisis

Public Health Crisis

Economic Crisis

Business Crisis

Service Leaders Are Faced With Exceptional Challenges

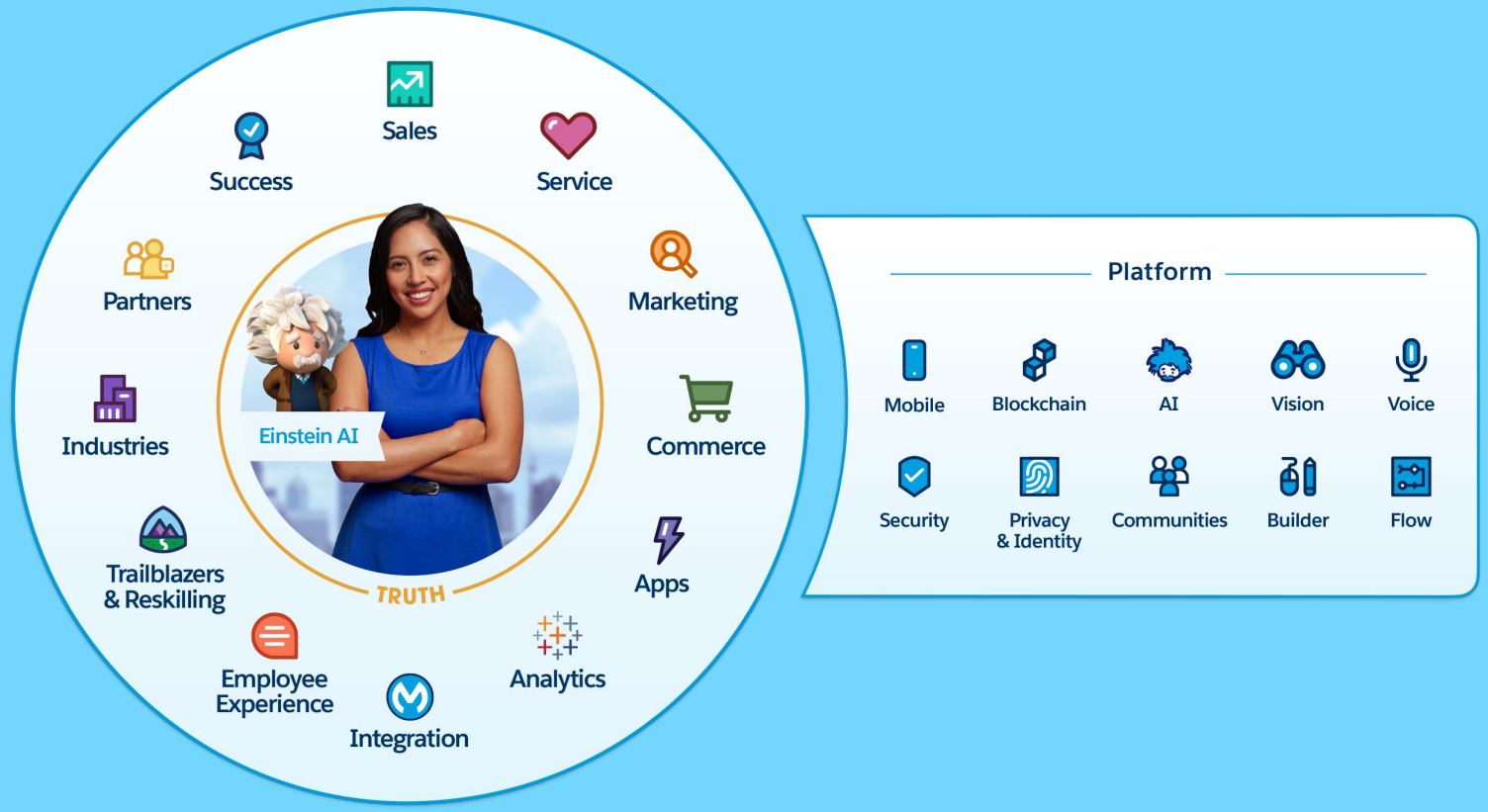
- Keeping the business afloat
- Having employees work from home
- Managing fluctuating case volumes
- Providing digital service
- Scheduling resources
- Safely doing mobile work
- Pivoting employees to new roles
- Reopening businesses & communities

Julie ODonnell
ConnectRN

Srini Pendala
Align Technologies

Salesforce Customer 360

Your platform for the digital imperative



Platform

Mobile | Blockchain | AI | Vision | Voice

Security | Privacy & Identity | Communities | Builder | Flow

Trusted, reliable platform

Fast time to value

Flexible configuration & updates

Smart apps with analytics & AI = **ROI**

CUSTOMER 360 SERVICE

Quickly Adapt To Change

World's #1 trusted service solution

33%
faster case resolution

50%
case deflection

Optimize Service From Anywhere, Fast

Equip agents and field service teams with 360° customer views in a single workspace to realize ROI fast

Scale Support Across Any Channel

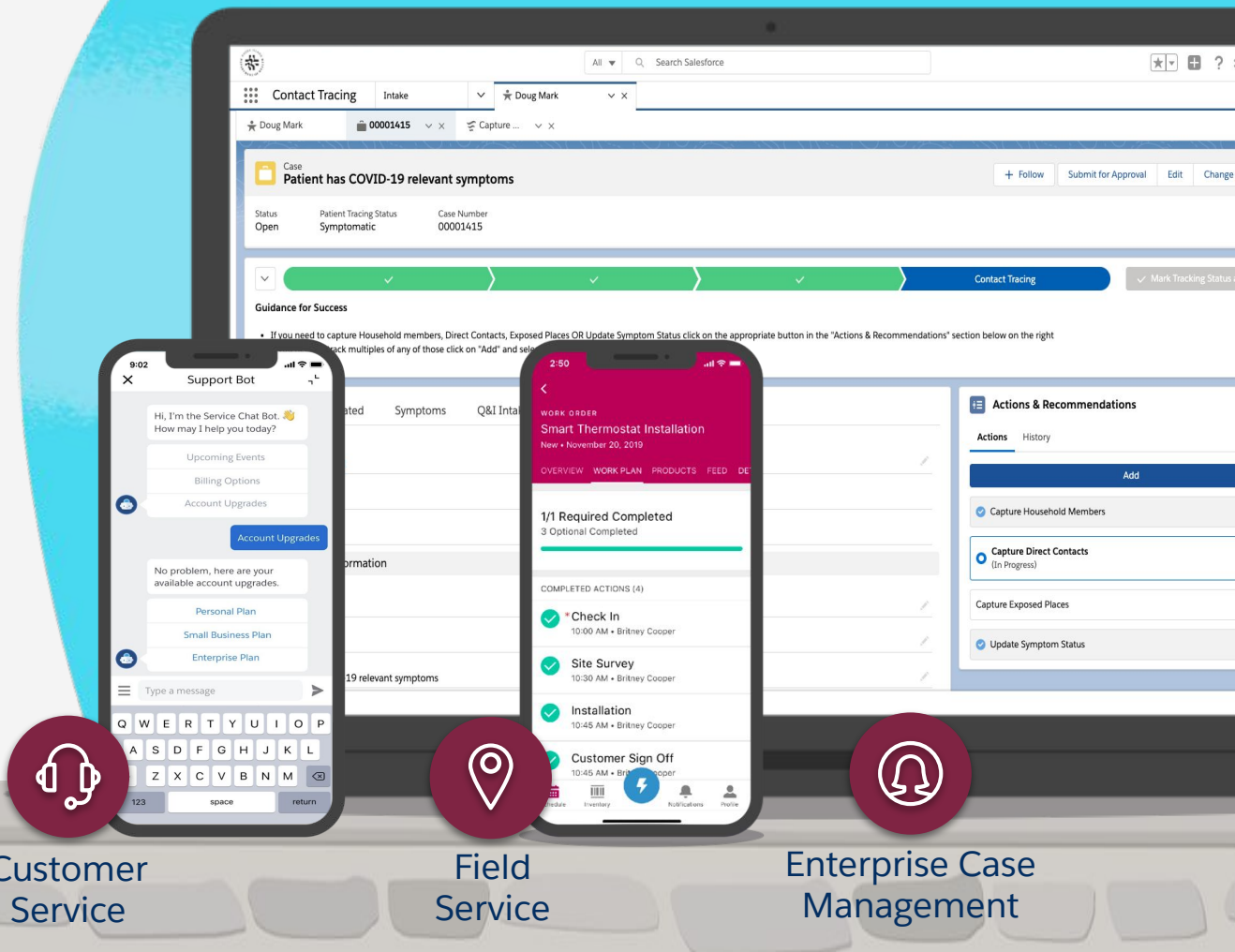
Enable customers to get help quickly and on their own terms with AI-powered bots, self-service and messaging

Accelerate Agent and Field Service Productivity

Empower teams to work faster with end-to-end automation, intelligent productivity tools, and on-demand training

Be Resilient With an Agile Digital Platform

Future-proof with a flexible, low-code platform to deploy service solutions quickly and make data-driven decisions



Salesforce Customer Success Survey, 2017-2019
Forrester Total Economic Impact of Salesforce Community Cloud on Customer Community

BE RESILIENT

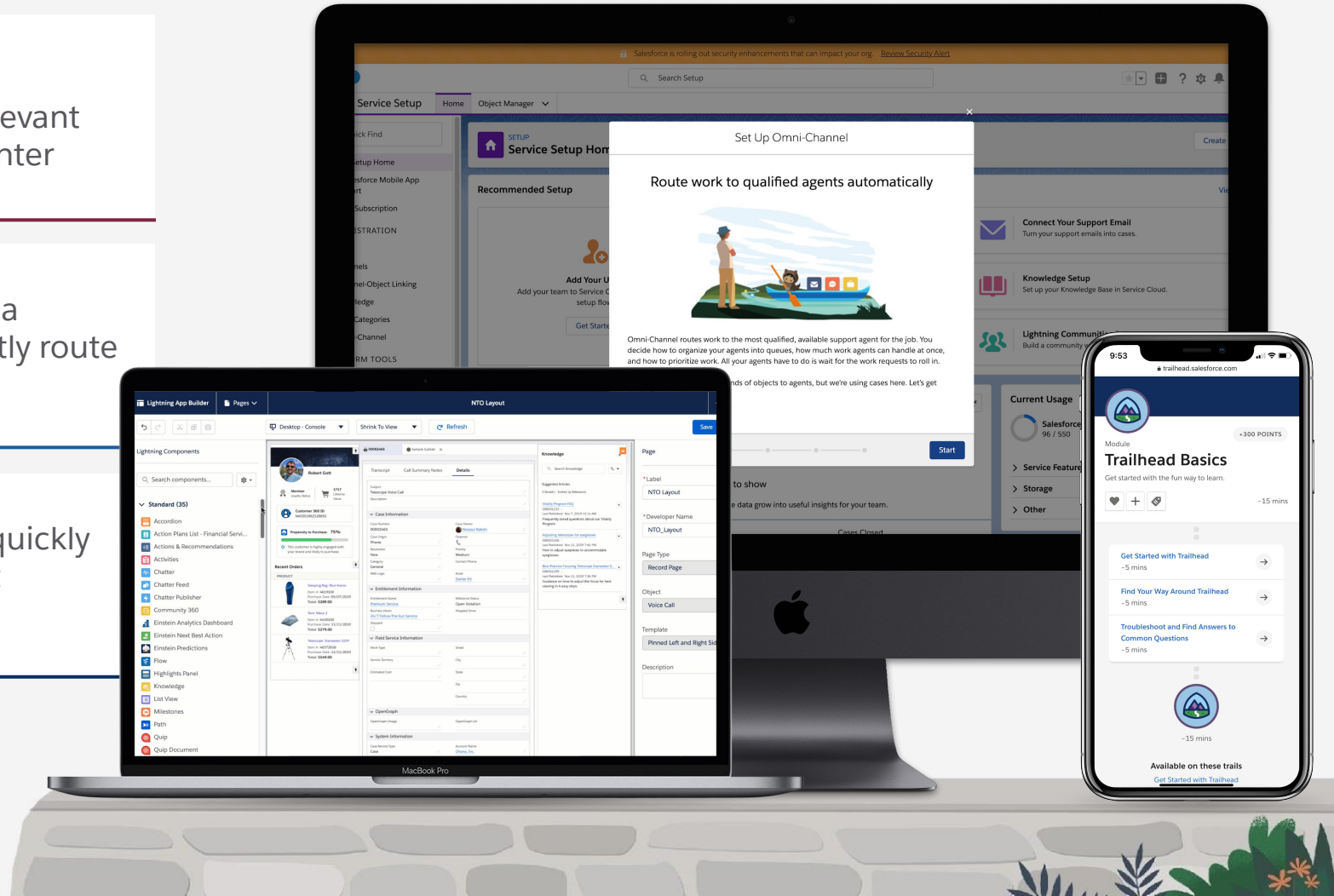
Quickly Pivot Your Team to Handle Specialized Issues

Respond to a change in demand with focused case layouts, routing, and training

Step 1: Customize case layouts with a drag-and-drop tool to keep the most relevant information and processes front and center

Step 2: Build a new support queue for a dedicated team and use AI to intelligently route cases to that team

Step 3: Ramp up and skill employees quickly with on-demand training and in context Knowledge articles



BE RESILIENT

Scale IT Resources and Innovate Faster

Use intuitive, low-code builders to create end-to-end service experiences

Lightning Flow Builder

Use point and click builders and reusable blocks to **build powerful processes and workflows**

Lightning App Builder

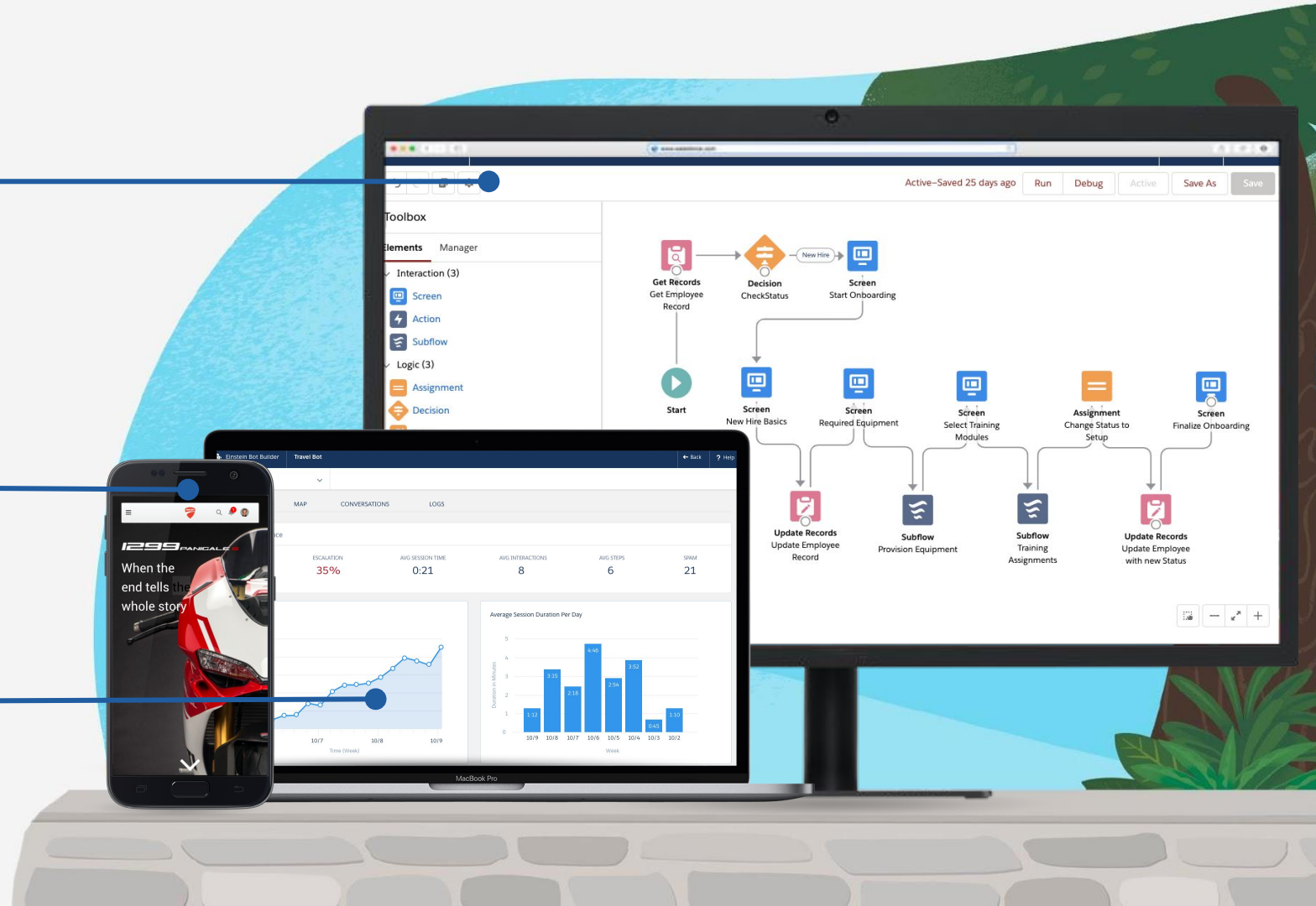
Solve business problems fast by **building apps declaratively** with drag-and-drop tools

Experience Builder

Quickly build **engaging service portals and help centers** with access to critical business data and processes

Einstein Bot Builder

Use an intuitive builder to **create CRM-connected chatbots** with NLP and quickly activate across channels



BE RESILIENT

Integrate & Connect Customer Data With Platform Agility

Create a single view of your customers with pre-built assets and pro-code tools

MuleSoft

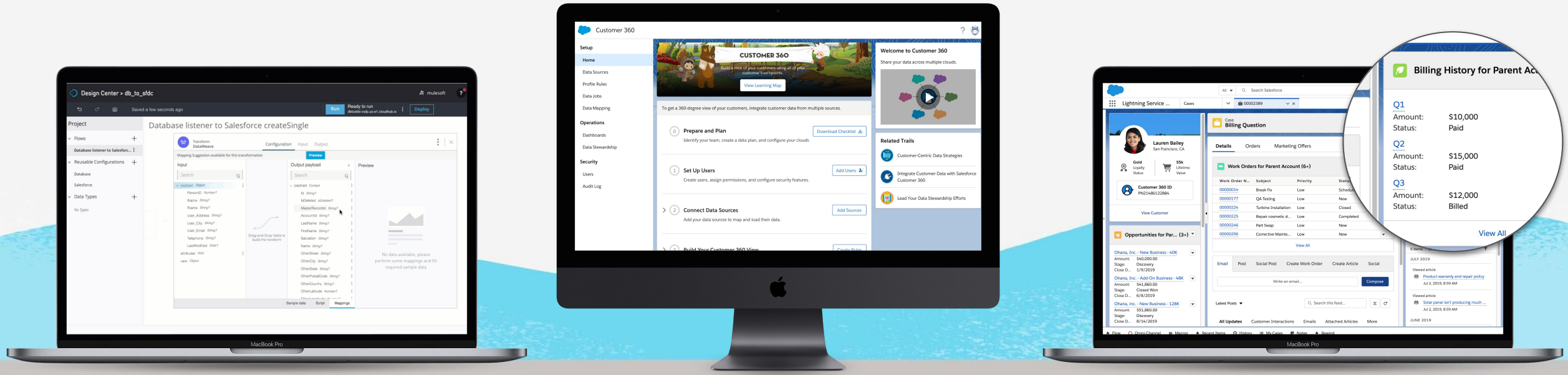
Leverage pre-built connectors and reusable APIs to **integrate customer data from any system**

Customer 360 Data Manager

Connect, match, and resolve customer data to create a shared view of the customer across depts

Lightning Components

Harness the data in Customer 360 to **build reusable components** that can be dropped into the service console



BE RESILIENT

Make Data-Driven Decisions With Actionable Insights

Quickly adapt to change with intelligent analytics, accessible from anywhere

Service Analytics

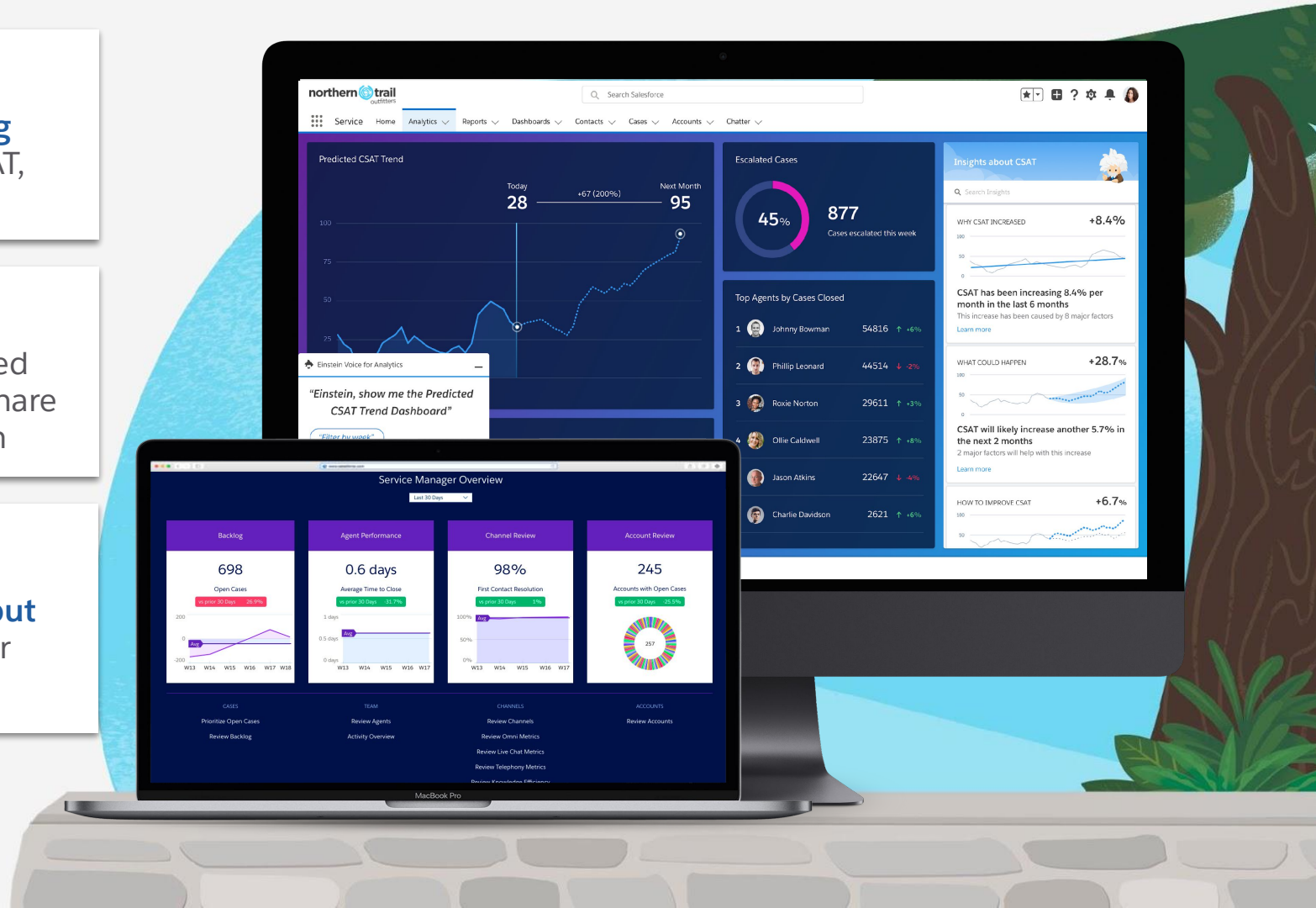
Unlock the value of your CRM data by **visualizing trends** across agent performance, channels, CSAT, and more with 20+ pre-built dashboards

Einstein Analytics

Connect multiple sources of data in an advanced analytics and machine learning platform, then share insights and enable business users to take action

Tableau

Give stakeholders access to timely insights and **put customer data to work** by providing analytics for everyone in your organization



OPTIMIZE SERVICE

Support Customers From Home to the Office

Service from a single screen with an adaptable workspace and integrated channels

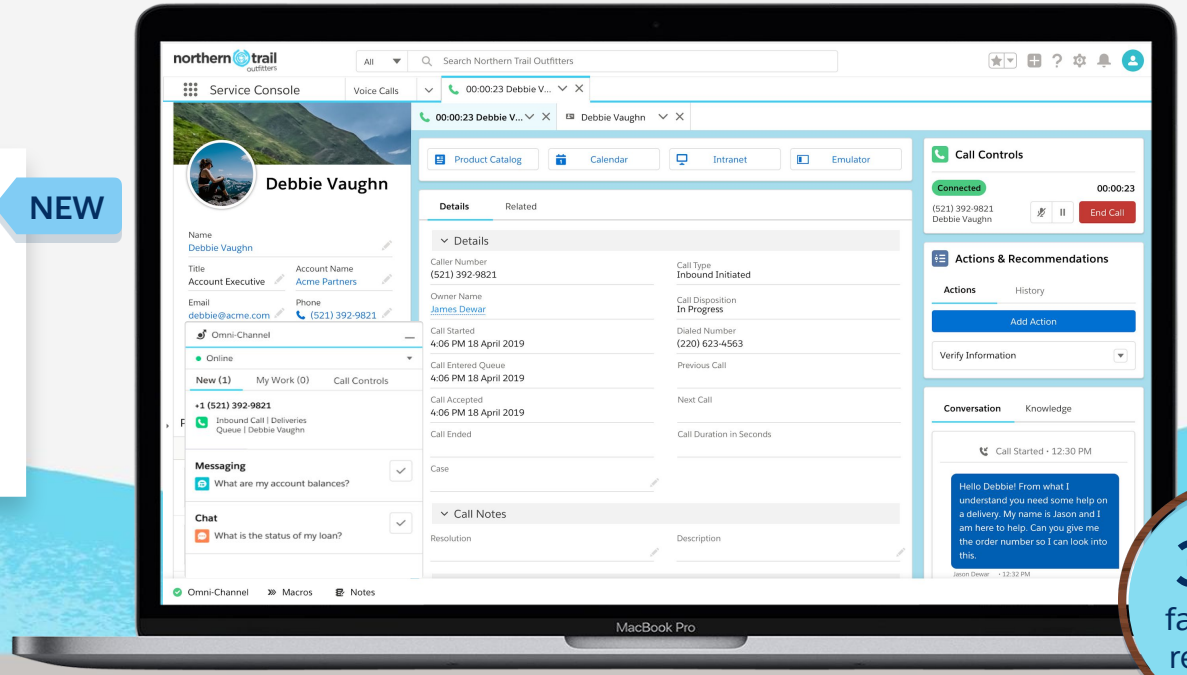
Service Console

Allow agents to quickly **handle cases from one screen** using an easy-to-use, drag-and-drop workspace with 360° customer views

Service Cloud Voice

NEW

Integrate cloud-telephony into the agent workspace to unlock real-time call transcription and AI-powered productivity tools



Chat & Messaging

Seamlessly toggle between voice conversations and **support on digital channels**, like chat, SMS, and WhatsApp

33% faster case resolution

Source: Salesforce Customer Success Metrics Study, 2019

OPTIMIZE SERVICE

Intelligently Route the Right Work to the Right Agents

Triage cases more quickly and efficiently with AI and automation

Einstein Case Classification

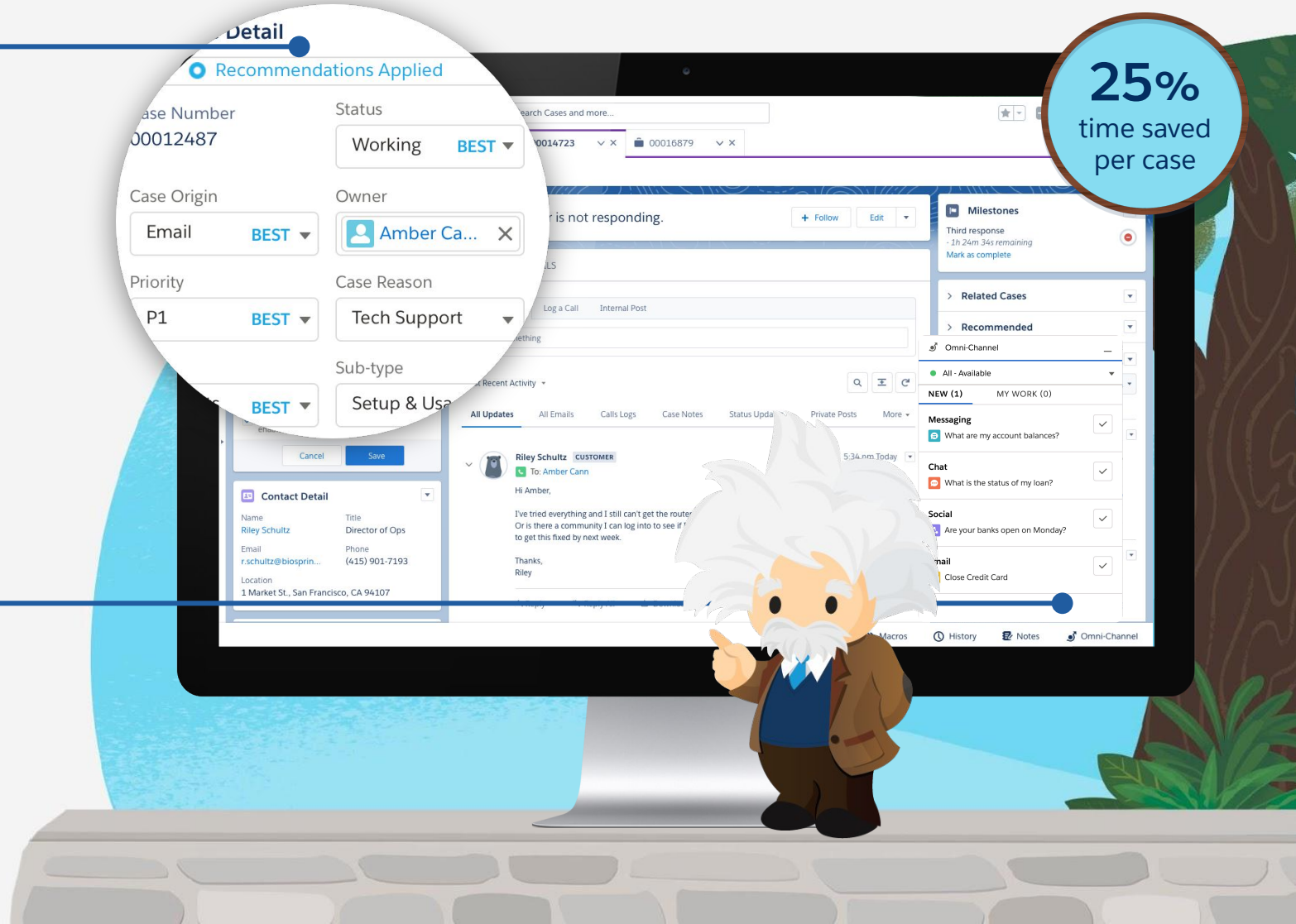
Analyze incoming cases and **predict case detail fields** using AI to save agents time

Einstein Case Routing

Automatically apply case field predictions and **route cases to the right agent** based on past outcomes

Omni-Channel Routing

Automatically push cases **from any channel** - messaging, chat, social, email, & voice - to the right agent or queue for efficient case resolution



Source: ZenConnect, 2019

But phone is disconnected from the service experience

It's Time to do More with Telephony

Service Cloud Voice: A new solution for contact centers...

Customer 360 Service

Service Cloud Voice

NEW

Digital Engagement

Einstein for Service

Pre-integrated telephony from Amazon Connect

SKU Available July 21st 2020

Amazon Connect

External telephony from other providers

Available 2021

"You have choice with voice!"

...Which is natively integrated to our Customer 360 platform

Unify Voice, Digital Channels, and Customer 360

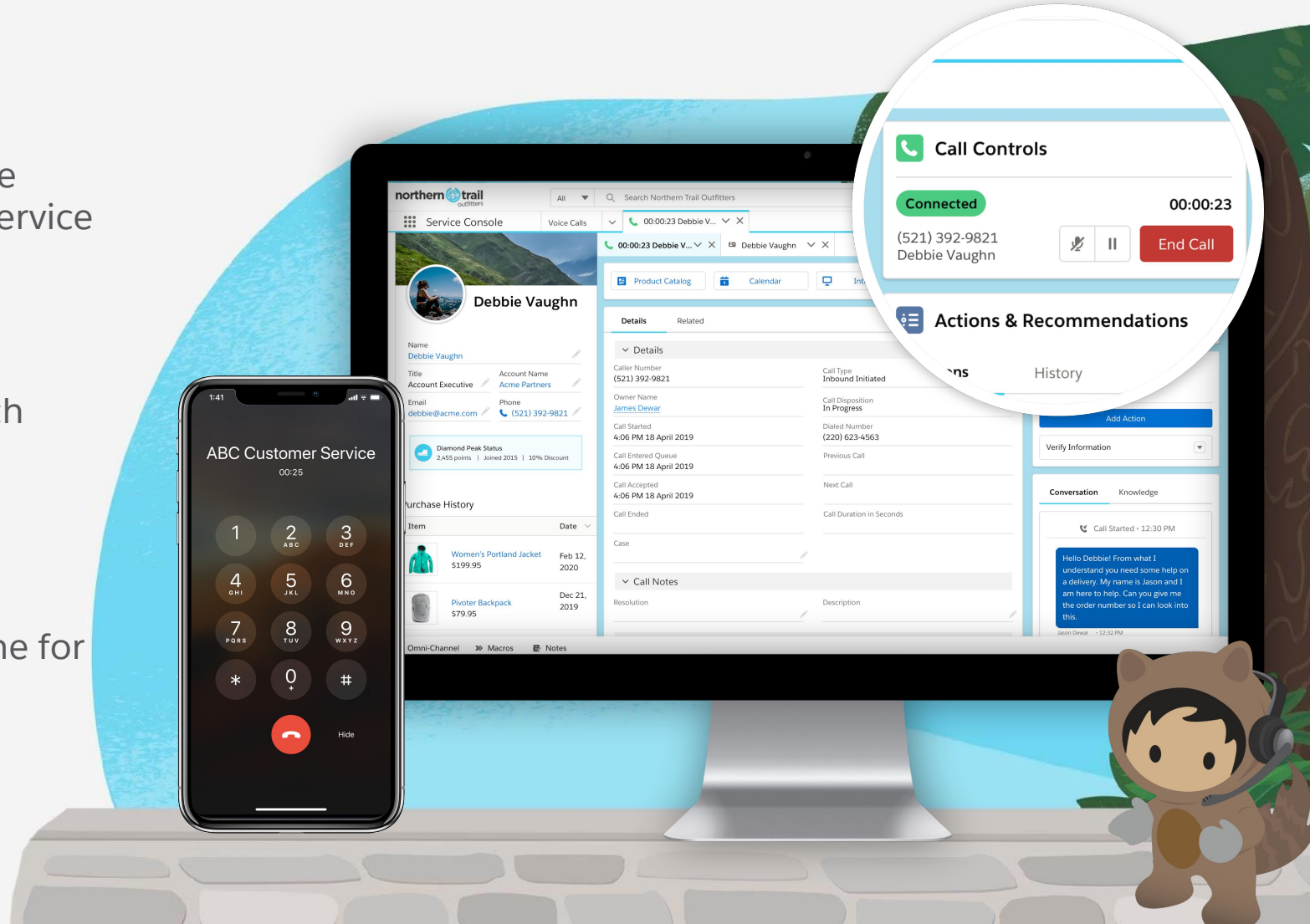
Integrate telephony and route calls alongside digital conversations within Customer 360 Service

Boost Agent Productivity with Intelligence

Leverage real-time call transcription to launch AI-powered productivity tools

Deliver Omni-Channel Visibility to Supervisors

Empower supervisors to view calls in real time for training, onboarding and post-call insights



SCALE SUPPORT

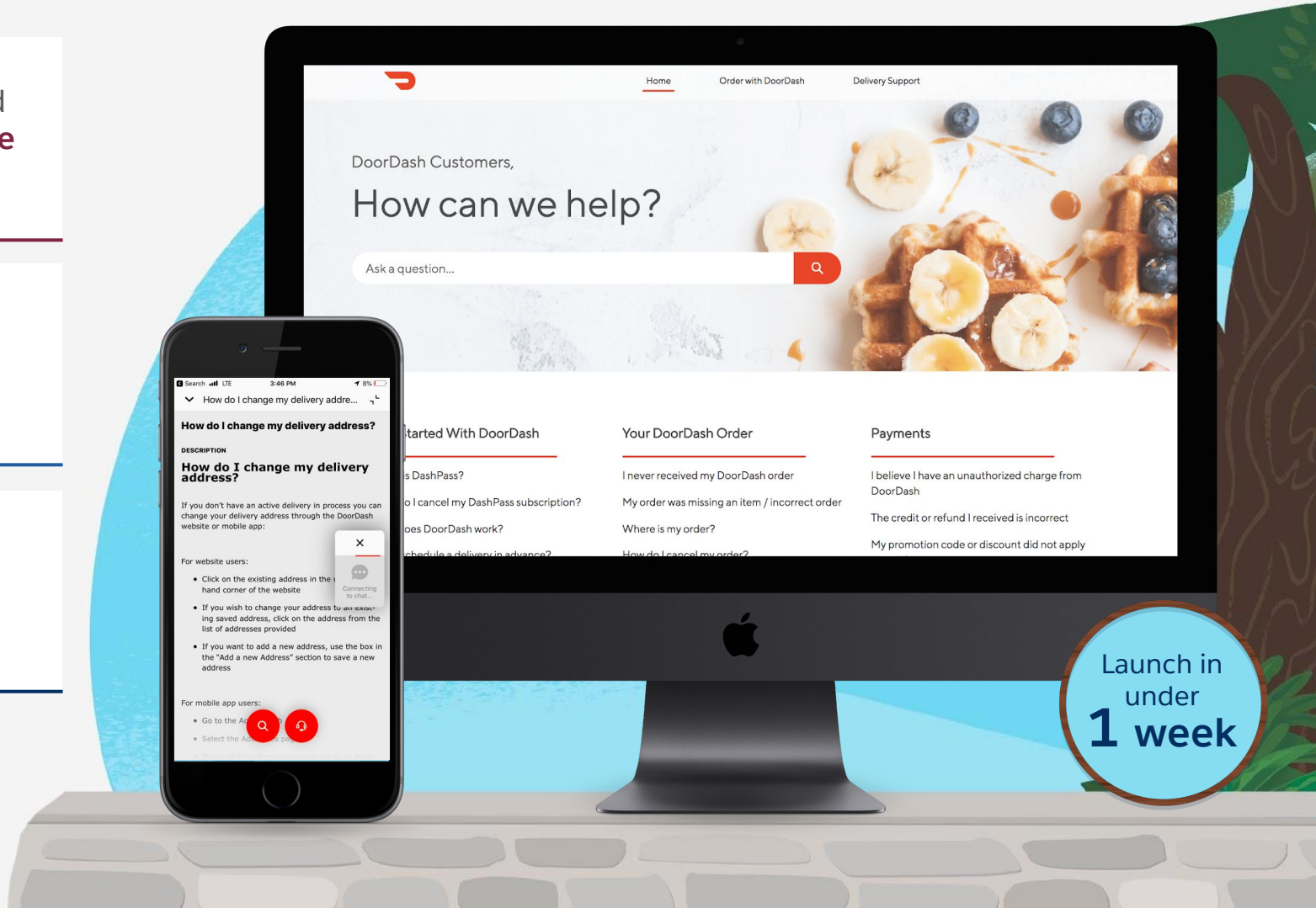
Empower Customers to Self Serve

Configure a portal, help center, and community to help customers find answers fast

Quickly **set up a portal**, help center and community with **easy-to-use declarative builders** and out-of-the-box templates

Easily **embed knowledge articles** and provide customers **access to mission critical data from any system**

Enable customers to **initiate and complete business processes** without requiring an agent



Source: Salesforce Product, May 2020

SCALE SUPPORT

Enhance Self-Service & Scale Support with Automation

Leverage automation and AI-powered bots to engage and guide customers

Lightning Flow

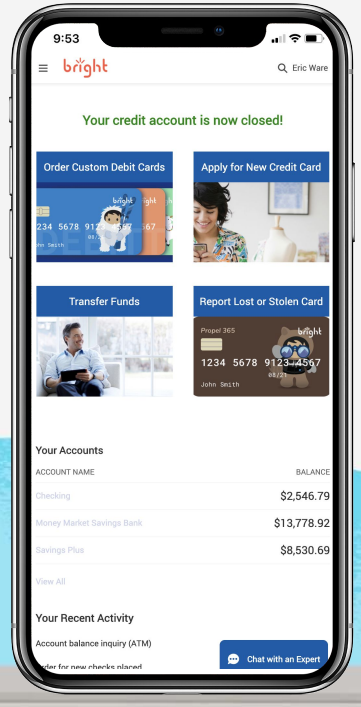
Accelerate self-service with **guided step-by-step processes** and workflows across systems

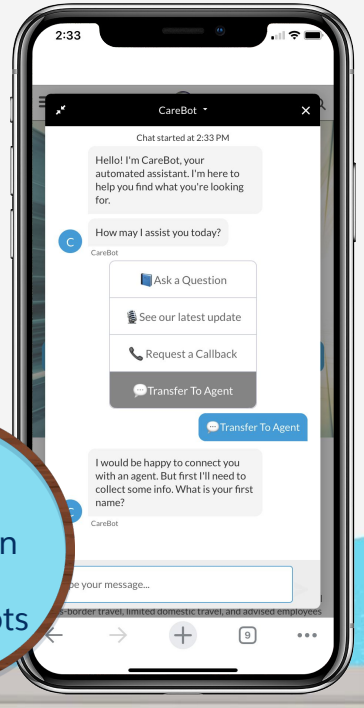
Einstein Bots

Handle FAQs and **collect case details** on chat and messaging before transferring to an agent

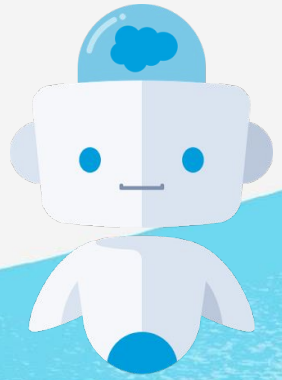
AppExchange

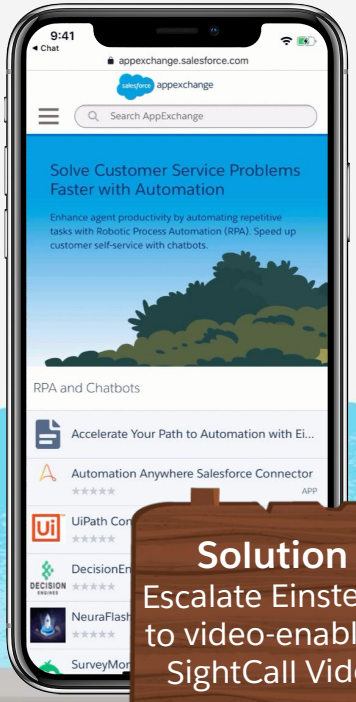
Expand automation with **pre-built Einstein Bots** for common use cases





20% decrease in AHT with Einstein Bots





Solution Spotlight
Escalate Einstein Bot sessions to video-enabled agents with SightCall Video Assistance

Source: Pearson, March 2020

SCALE SUPPORT

Streamline Service Across Every Customer Touchpoint

Increase customer satisfaction with seamless omni-channel support

Chat & Messaging

Extend real-time and continuous support to customers' **preferred channels**

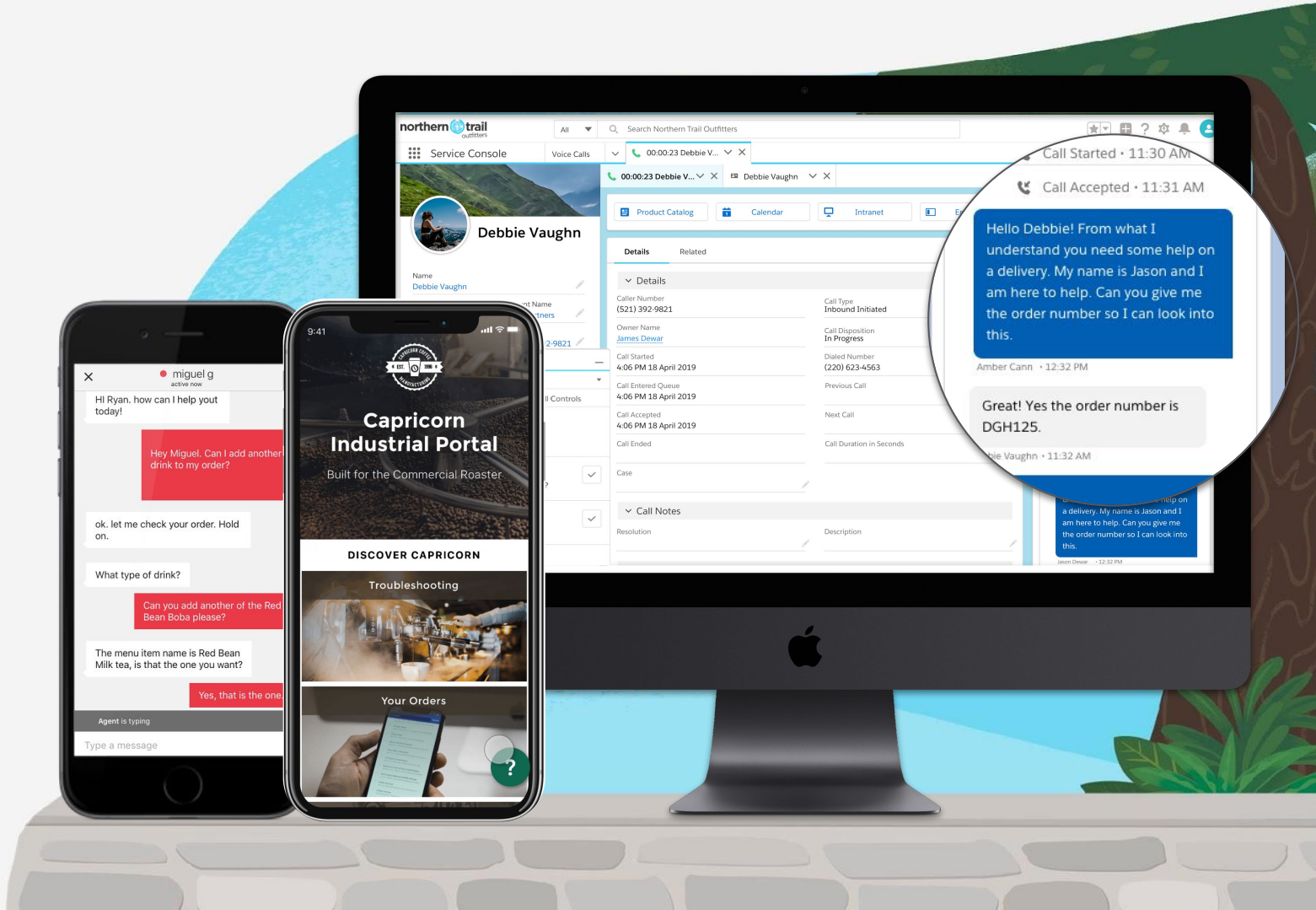
Channel Menu

Make contacting support effortless with a **single view of all service channels**

Service Cloud Voice

NEW

Help agents resolve voice cases faster with **real-time call transcription**



ACCELERATE PRODUCTIVITY

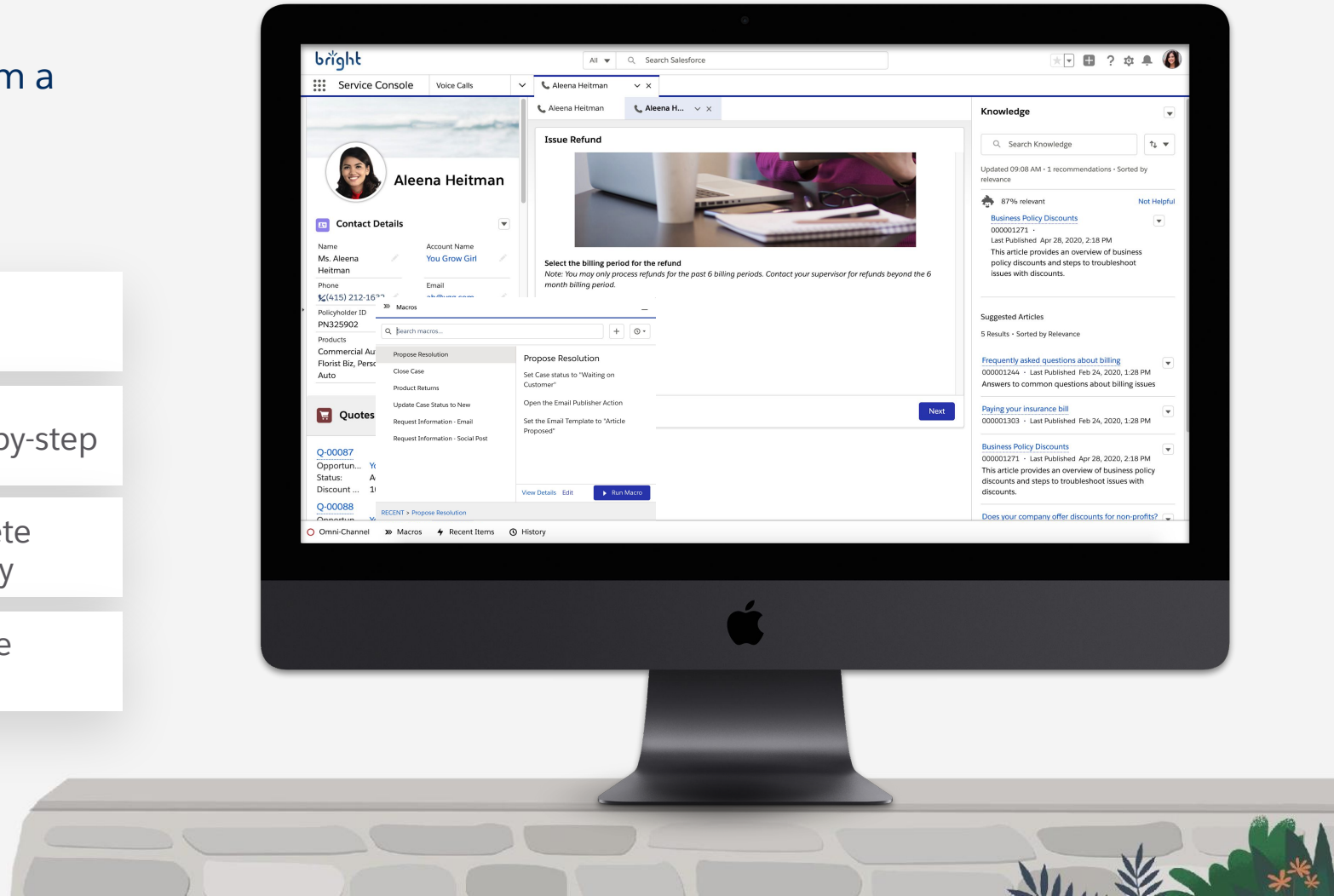
Efficiently Manage Increased Case Volume

Give agents a complete view of cases & customers and built-in productivity tools

Arm your agents with the tools they need to streamline their work and resolves cases from a single screen, from anywhere.

Resolve cases faster by:

- **Taking action** from a single workspace
- **Guiding agents** through workflows step-by-step
- **Automating repetitive tasks** and complete high-volume, low complexity tasks quickly
- Delivering thoughtful experiences at scale with a **complete view of every customer**



ACCELERATE PRODUCTIVITY

Surface the Best Answers & Enable Agents to Swarm On Complex Issues

Knowledge

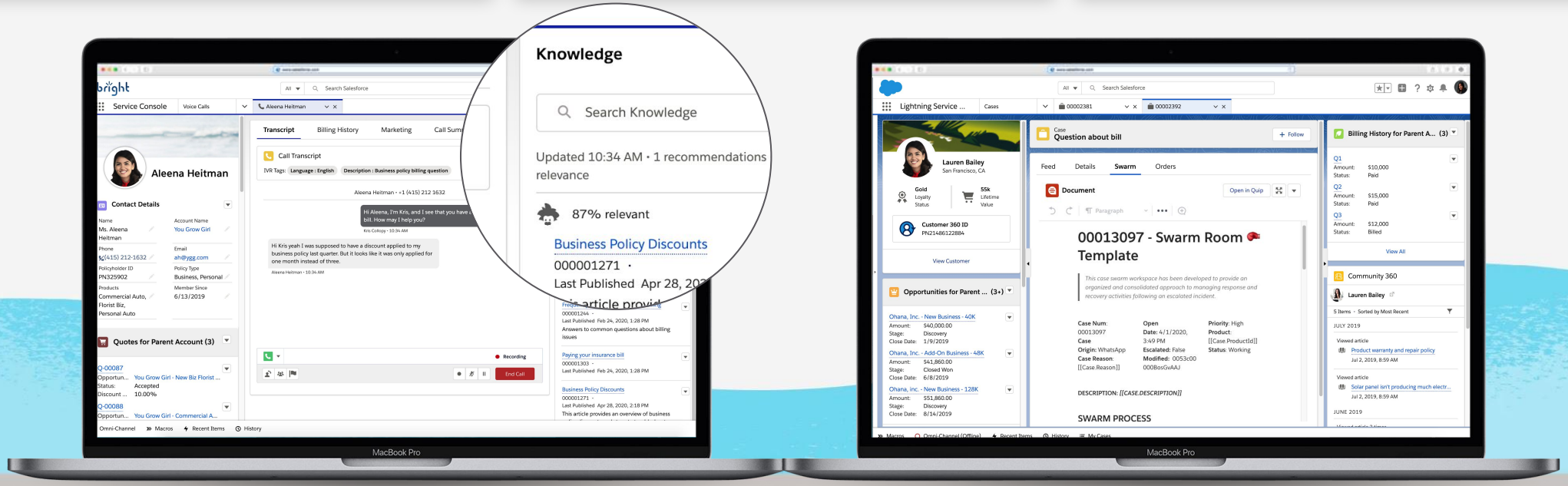
Centralize and share knowledge, **keeping agents up-to-date** on the latest processes

Einstein Article Recommendations

Leverage machine learning to surface the right knowledge article and **answer every question faster**

Quip for Service

Capture notes, analysis, and learnings **in one place** and swarm cases as a team



ACCELERATE PRODUCTIVITY

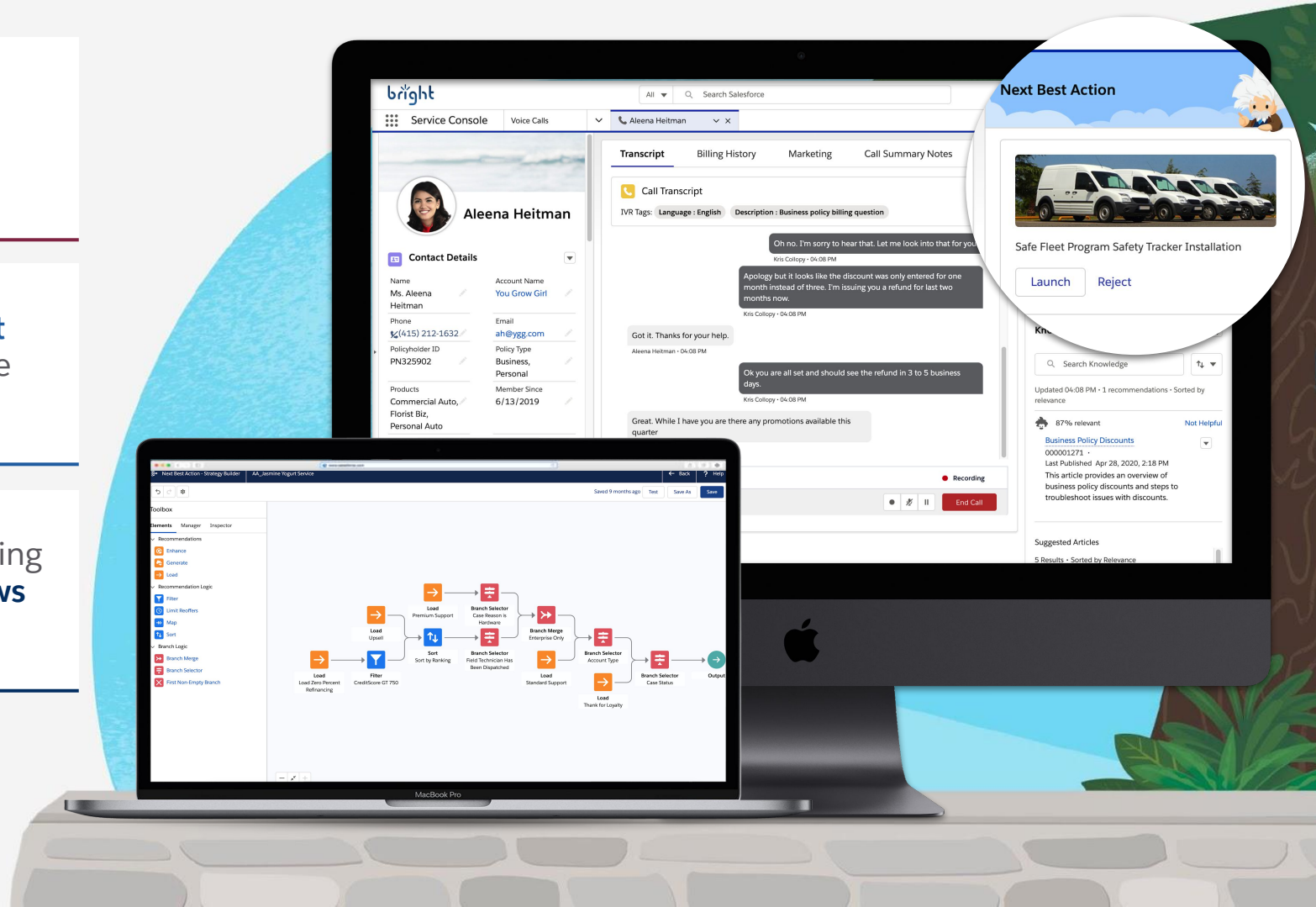
Maximize the Impact of Every Customer Interaction

Drive loyalty with Einstein Next Best Action

Combine business rules & AI to surface **cross-sell & upsell offers** or service notifications to agents at the right time

Automatically deliver the **most relevant recommendations** as the context of the case changes

Connect recommendations with Lightning Flow to **automatically initiate workflows and actions** in the background



Work.com

Reopening will be a journey. Here's your guide.

Reopen Your Communities & Businesses Safely

Expert advice and trusted data from our Tableau COVID-19 Data Hub to guide fast decision-making

Return to Your Workplace

Apps to assess employee and workplace readiness, guide reentry and staffing, including a command center & manual contact tracing

Reimagine Your Organization

Advisory services, best practices, and grants & volunteer management apps to help you reimagine your business for the new world

Reskill Your Employees

Deliver learning & wellness content with pre-built content kits to help you create a growth culture with myTrailhead

Respond to Any Future Crisis

Allocate health, public, or private sector services & enable manual contact tracing & Emergency Response Management

Built on the #1 CRM Platform

Resources

#ROMAINNOVATION

CENTRODIAGNOSTICOITALIANO

CDI

LIFE FROM INSIDE

coop

SALTA LA CODA CON COD@CASA

REGIONE CAMPANIA

https://www.youtube.com/watch?v=nwad2fedVmE

https://www.soresa.it/Lists/Contenuti/Web%20APP%20Test%20Tamponi/Documentazione/Manuale%20e%20Tutorial/GUIDA%20UTENTE.pdf

https://www.e-coop.it/web/coop-lombardia/codacasa

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