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2021

All the key insights from Dreamforce 2021
in a nutshell - by Spire's specialists.

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Impressions of inSpire.d 2021.





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The Customer Link

Sales/Service cloud

Sales Cloud

As employees increasingly work from home, the need for a centralized digital headquarters that promotes efficiency and success for salespeople emerged and Salesforce provided the answer. This year, Salesforce focused its **Sales Cloud innovations** on three key topics.

Analytic Insights

Gain more and better insights into revenue via AI which allows salespeople and managers to make data-driven decisions. Think about functionalities such as: pipeline inspection - movement diagram, Einstein opportunity scoring, Einstein conversation insights.

Sales Enablement

Salespeople need to be able to do their jobs effortlessly, not only your current employees but also newcomers need to easily find their way around your organization's sales process. The acquisition of Slack plays a crucial role in this. (Meeting studio, Slack deal rooms, Slack automated alerts)

Subscription Management

Salesforce focused on improving their subscription management (products with a lifecycle that doesn't

end after a sale, such as subscriptions, warranties or memberships) as we increasingly live in a membership economy (customer asset lifecycle management).

Service Cloud

Today, an effortless customer experience is required to drive customer loyalty. Salesforce improves the customer experience by focusing on more automation and proactivity, all from your centralized digital headquarters.

With **customer service incident management**, you can automatically respond to new instances that arise from the same problem. The **remote visual assistant** connects your service/office staff and customers with a simple SMS or email. This way everyone saves time and can work more efficiently.

The **Einstein conversation mining** analyzes all your emails, chats, cases and phone calls to suggest the best actions to take for an optimal customer experience. Behind-the-scenes automation has also been improved with **comprehensive flow automation**. You can now automatically send replies containing knowledge articles and route cases in a more efficient way.



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Tableau

When Salesforce acquired Tableau, now roughly two years ago, no one really knew what to expect. What we did know was that the best CRM ecosystem out there was joining forces with the best Visual Analytics platform. Hello high expectations! After many years as a technical Tableau consultant, Tim's expectations were more than fulfilled.

Salesforce knows how to integrate tools like no other. The perfect blend of the two worlds came to life with the rebranding of Einstein Analytics into Tableau CRM. A bold but very powerful move that brings a significant part of the visual and analytical part under the umbrella of Tableau. But what does this mean?

Connectivity

Initially, the connectivity between **Tableau Desktop** and Tableau Prep was available for **Salesforce CRM** (Sales Cloud and Service Cloud) but not yet for all cloud products. The arrival of the **Salesforce CDP connector** and **the Salesforce Datorama connector** makes it possible to connect to Marketing Cloud and Commerce Cloud data as well.

Embedding

In 2021, analytics must be ever-present and visible where the work gets done. Integrating business analytics into portals, websites and other systems is key for any business that wants to be data-driven. Salesforce made the effort of **Embedding Tableau Dashboards** significantly easier thanks to their **Tableau Lightning Web Component**. The whole process becomes as easy as dragging a Tableau Dashboard into a Salesforce page. Piece of cake!

Analytics and AI

Einstein stands for making things faster, easier, smarter and usually more automated. In past Tableau releases, Einstein and many of his predictive capabilities popped up in Tableau as well. Want to build and train a predictive sales model on your transactional data, then take it outside your CRM to analyze it in real-time in Tableau for new data or to perform what if analysis? **The Einstein Discovery extension** makes it happen. Note that today this is also possible in Tableau Prep.

Conclusion

The above demonstrates how committed Salesforce is towards integrating and unlocking the potential of the Tableau product line into its existing ecosystem.



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Marketing Cloud

Today's customers are digital first, whatever the device, channel, time or place, every interaction counts. Trailblazers are transforming the way they work to make Marketing moments connected, relevant and human. Salesforce helps marketers embrace AI and automation, prioritizing privacy and finding agile ways to collaborate.

A number of important innovations were announced that will further facilitate the creation of an easy accessible single source of truth for all customer data.

Salesforce CDP AppExchange integration

Marketers will have more ways to unify and activate customer data through a big system of partners in AppExchange.

With Salesforce CDP Natively built in Hyperforce, you can bring together data from Salesforce across Sales, Service, Marketing, Loyalty, Commerce and external data sources and unify everything in a single source of truth combined with powerful AI insights to humanize every customer interaction.

With a couple of clicks you can insert trusted apps from various partners, empowering your ability to deliver powerful marketing moments.

Marketing Cloud for Slack Apps

With Slack integrated in Marketing Cloud your team will gain visibility into **Journey Builder**, even

when they aren't an active user. They can easily collaborate on Journey updates and changes are pushed to Marketing Cloud right from Slack, bringing visibility and efficiency to the whole team. In the meantime, **Einstein AI** automatically runs experiments in the background monitoring your journeys for abnormalities and recommendations, alerting you when the experiment is completed. It's also easy to share campaign assets and reports to executives for closer alignment. All this gives the collaborations between teams a huge boost.

Pardot & Slack

Salesforce is taking it to the next level with Pardot and Slack. It will be easier than ever for Marketing and Sales reps to stay aligned thanks to Live Collaboration, Realtime notifications and Custom messaging for prospect-based activities. When a prospect shows interest, your team is there and ready to take immediate action. This will all result in making the pipelines and cycles shorter for Sales, a better ROI for Marketing and a better customer experience overall.

Datorama Advanced Reports

Marketers today have to work smarter, not harder and make informed data-driven decisions in realtime. With Datorama reports advanced, dashboards can easily be customized, and a cross-channel view is immediately available for marketing and sales. Data therefore becomes very easily accessible and shareable across all channels within teams.



Roeland De Smet

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Dots and Arrows

MuleSoft

The focus for MuleSoft is 'Integrate everything, Automate anything' and now more than ever since IT holds a more critical role every year.

According to MuleSoft's own research, IT saw an increase in over 30% more projects to deliver. This in contrast to only 37% of IT teams that were able to complete all their projects last year. The delivery gap is very visible and remains a challenge for IT teams with the average customer interaction being fragmented in over 30 systems.

MuleSoft brings solutions that will lessen the burden on IT teams and give business users more power through **a series of new innovations:**

Slack

MuleSoft jumps on the Slack wagon to help build that **Slack-first Customer 360 solution**. With a **MuleSoft Slack connector** and a **MuleSoft Composer** coming to the Slack app directory. MuleSoft powers Salesforce Customer 360 and empowers Trailblazers to create truly connected experiences with Slack, Sales-Cloud, Service-Cloud, the Tableau- platform, and more. Connecting a human integration layer, which is Slack, with the MuleSoft System Integration layer.

Robotic Process Automation

With the recent acquisition of Servicetrace, MuleSoft takes further steps into the world of **Robotic Process Automation** or RPA with which repetitive tasks can be automated. An example: you can create a customer request in Salesforce from an incoming email with pdf attachment containing the details. The RPA processor in MuleSoft processes the content of PDF and your Mule flow handles the rest.

MuleSoft Composer, which is built right into Salesforce, helps users to build fast and easy integrations with systems like Netsuite, Jira, Salesforce, serviceNow, Tableau, Slack and others...

An example: When a customer gets in touch with company X, a ticket is logged in ServiceNow. When engineering is involved, customer support needs to manually log a ticket into Jira (the system used by engineering.) With **MuleSoft Composer**, users can easily build an integration that automatically creates a Jira ticket when engineering's help is needed, and a Slack message is automatically posted in the engineering channel with a direct link to the ticket. Efficient and fast



Jan De Vos

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Commerce cloud

We're all a little tired of hearing about how the pandemic has changed the world, from a Salesforce Commerce Cloud's perspective it has mostly confirmed that having such a scalable and flexible platform is a great competitive advantage and gives industries the power to overcome such disruptions. So, at Dreamforce, Salesforce Commerce Cloud focused on providing their customers with more tools to go even further in customer centricity, continuous improvement and expansion.

Order Management System

The Salesforce Order Management system takes orders and makes sure everything is routed to customers in the most efficient manner, taking inventory and routing logic into account. It modernizes the post purchase experience with customer centricity in mind and allows cancellations and returns to be done from within sales- and/or service cloud, empowering your business to better help their customers.

Salesforce Order management is now natively integrated with both B2B as B2C Commerce Cloud with powerful integrations like payment- and shipping providers. When you are struggling with new delivery methods (think about the curbside or in-store pickups), delivering to your customers from the right locations, or simply want to take this logic out of a traditional ERP, go for Salesforce Order management.

PWA and Headless

Online customer journeys have become an inspirational, educational and often expert led journey. Headless commerce provides a fast time-to-market, flexible, unique digital experiences and agility for developers and businesses. Commerce Cloud is an API first platform and provides the powerful building blocks for the headless set-up. When decoupling your

storefront User Experience from your backend you don't want to risk compromising the backend. With Commerce cloud you have the tools you need. With **Managed Runtime** you escape the hassle of uptime and scalability (thanks to Mobify) and you get the best of both worlds.

If you want to be one step ahead in communicating with your customers in multiple ways and providing them with a unique customer experience on multiple devices, **Headless Commerce leads the way.**

CDP – Customer 360

Connected actionable data has become the key to a personalized and high-quality digital experience across multiple channels. Thanks to the **Salesforce CDP connector**, you can easily integrate and use the Commerce Cloud data within the CDP creating a **powerful single source of truth for your customer.** The intention is to use this data in the Einstein AI engine to enable more targeted and relevant marketing campaigns.

Tableau Integration

Having data is one thing, but visualizing data from your storefront is something else. Now this visualization can be achieved with a pre-built tableau integration enabling custom analytics and providing customized, actionable insights. In addition to your internal analytics, more advanced use cases that require e-commerce analytics are now supported.

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