



salesforce

# Blaze a New Trail to Service Transformation

With Service Cloud, the world's #1 Service Platform

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# Who are our Customers?



# Everyone is a Customer and Every Customer Is Connected

With smart, always-on devices, and real-time interactions



# Only Digital? Stores Are Still Vital and Will Continue to Be



**85%**

of purchases still occurring in physical location by 2020

**56%**

of shoppers visit stores after receiving mobile offer

**46%**

will check in-store to get more information



**4%** shoppers believe that retailers know who they are

# The Customer Crisis

The Fourth Industrial Revolution is creating a customer divide



Your  
Company

Your  
Customer



**80%** of B2B buyers expect real time interactions

Source: "State of the Connected Customer,"  
Salesforce Research, October 2016

# For Customer Service, It's Hard To Help With So Many Competing Priorities



Cost Reduction

Customer satisfaction

Siloed systems

Agent experience

New workforce

Operational excellence

Service innovation

Rising expectations

# Know Your Customers

## Get Smarter About Your Customers



- Online and in-store history
- Real-time view of shopping cart
- Spending & credit profile
- Open Order Status
- Loyalty profile
- Wish list
- Preferences and personal notes
- Product catalog
- 360° View

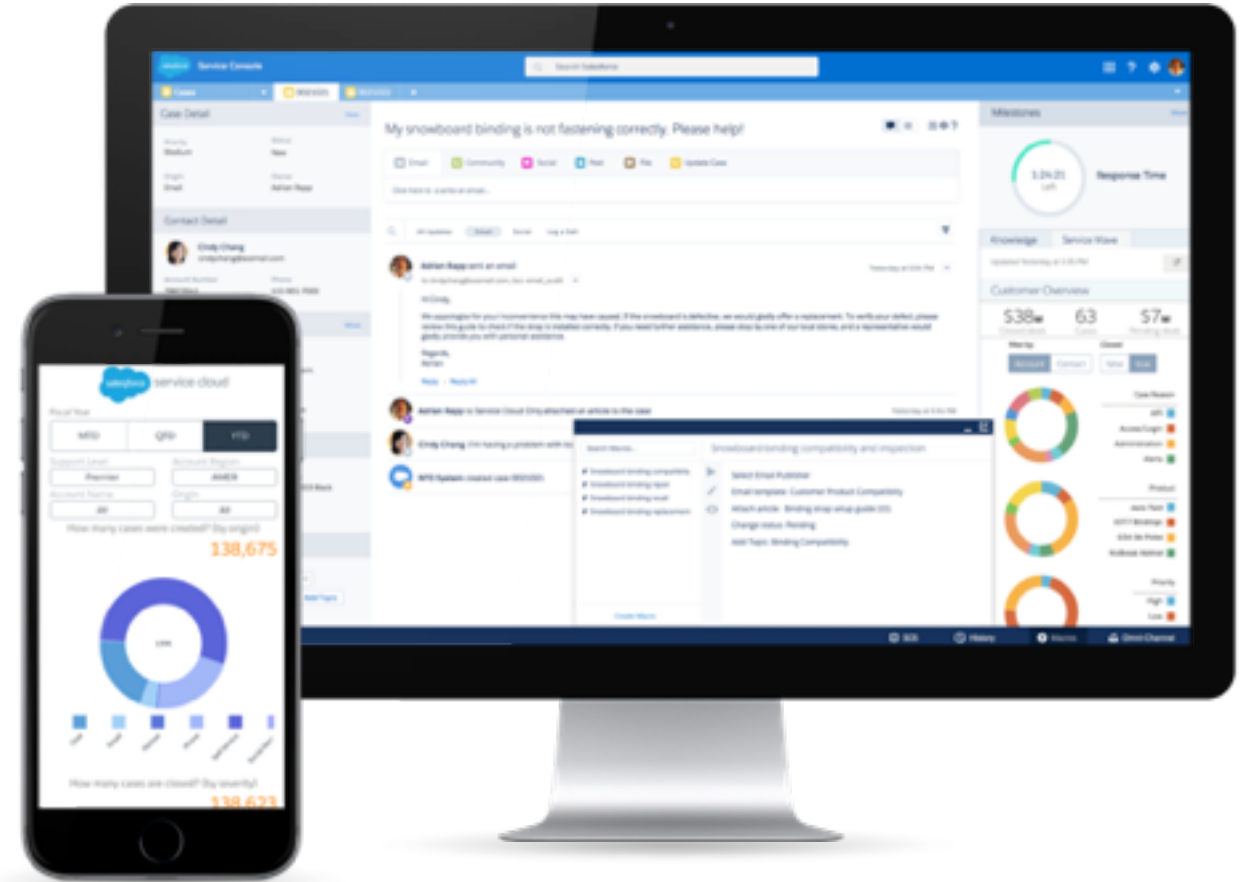


# Serve Your Customers

## Deliver Intelligent Service



- Service and case status/history
- Face to Face service
- Incident Reporting
- Self Serve
- Help Desk
- After sales processes
- Exception Approval Process

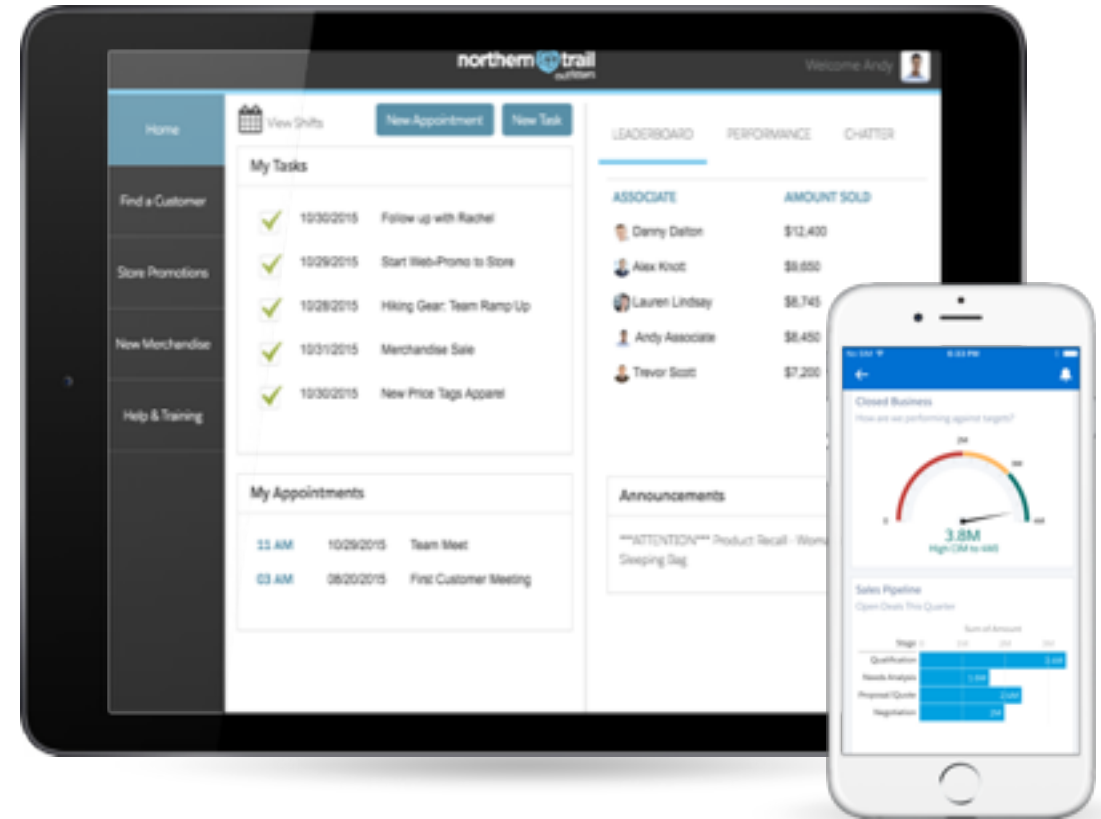




# Measure Success Smarter Actions



- Store & Associate Performance
- Real-time Analytics
- On Line Performance
- Product Training & Gamification
- Built-In Collaboration
- Agent Performance
- Agent Experience



# Salesforce Service Cloud

Transform service with the world's most complete and agile platform

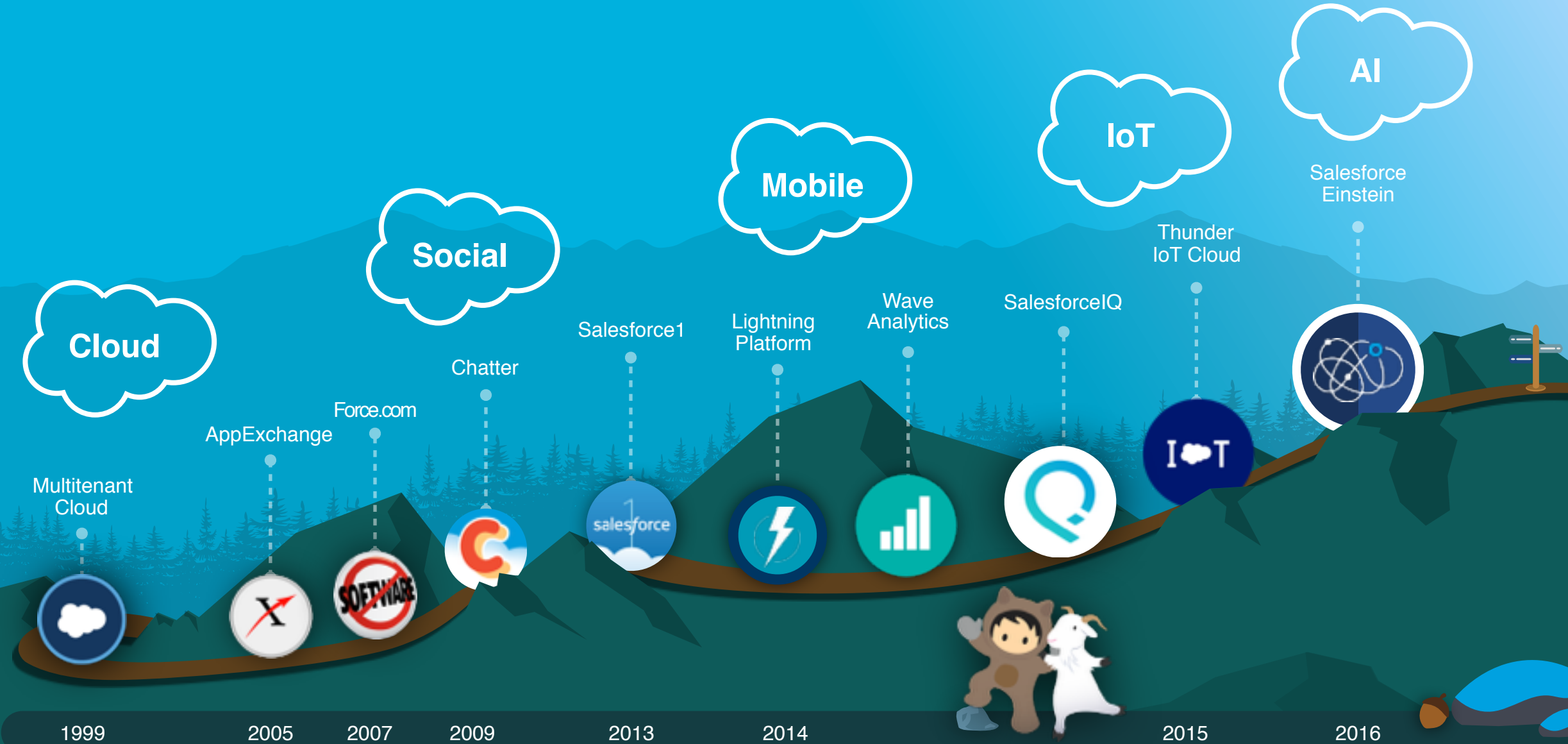


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# We are anticipating industry innovation since 1999

Innovation in the Salesforce Platform



# Salesforce Continues Leadership in Customer Engagement

Figure 1. Magic Quadrant for the CRM Customer Engagement Center



Source: Gartner (May 2017)



Magic Quadrant for CRM Customer Engagement Center

April 2017

Analyst(s): Michael Maoz, Brian Manusama

A LEADER

9 Years  
in a row

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# World's #1 Service Platform

Transform service and deliver customer success with Service Cloud



## Digital Engagement

Make service seamless across messaging, social, web, and in-app channels

## Self-Service

Deliver a completely connected self-service experience

## Customer Service

Transform service with the world's most complete and agile platform



**Michael Williams**  
VP, Global Head of Service Field Solutions Development, KONE

## AI for Service

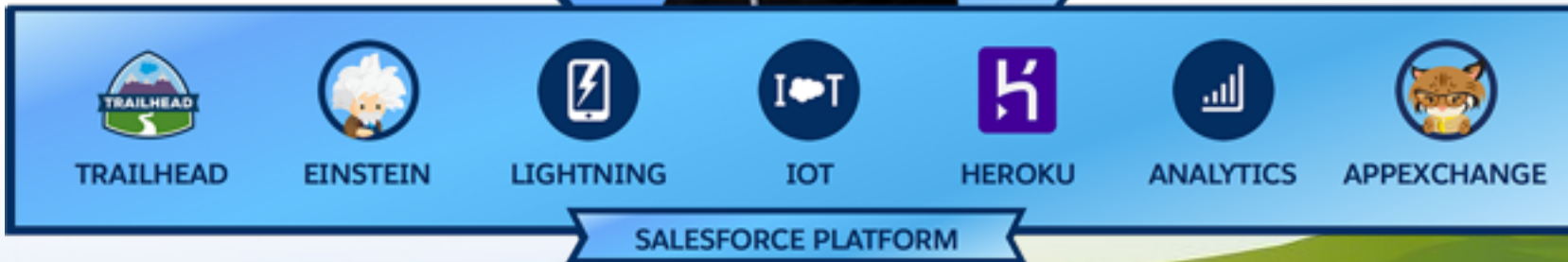
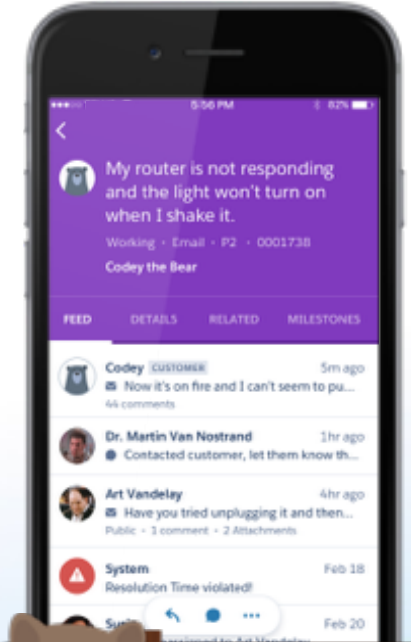
Scale support with intelligence for customers, agents, and managers

## Service Analytics

Empower managers with deep, actionable insights and reporting

## Field Service

Connect field operations to the business with a next-gen mobile experience



+32%  
customer  
satisfaction

# Next-Gen Service with Service Cloud Lightning



Lightning Service Console

Lighting Service Setup

Case Management

3rd Party Data Integration

Macros

SLAs & Entitlements

Knowledge

CTI Integration

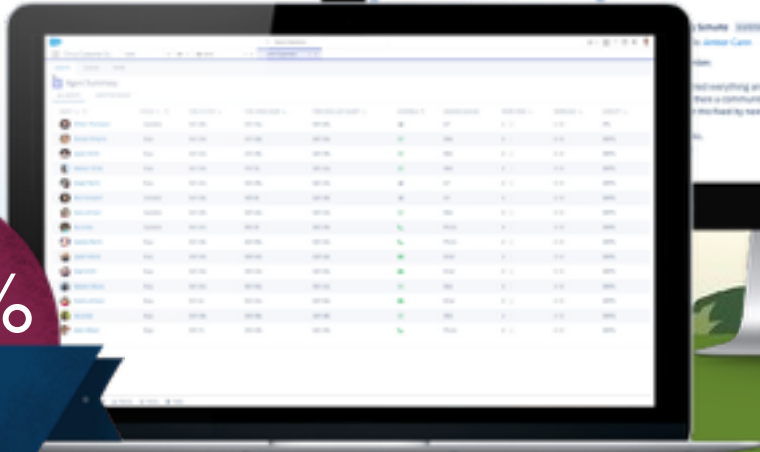
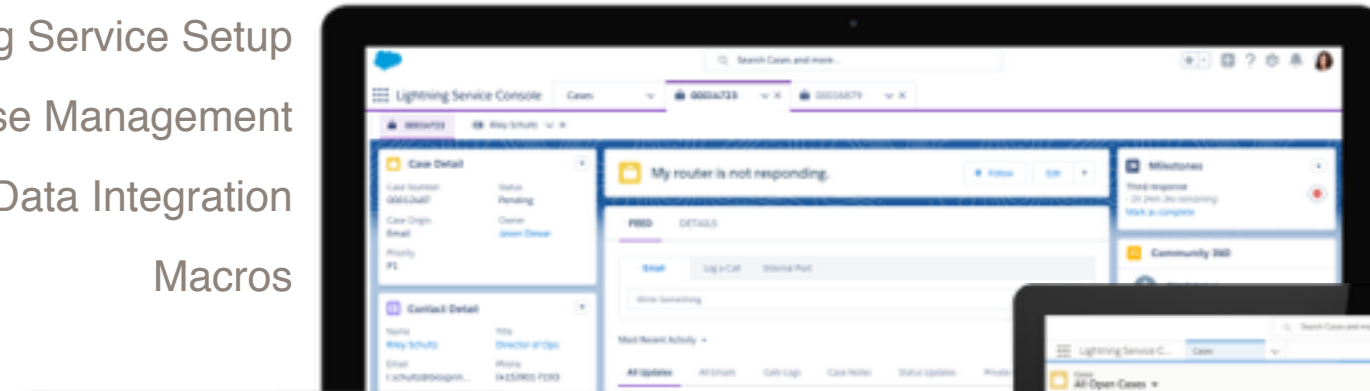
Omni-channel Routing

Workflows & Approvals

Custom Reports

**+31%**

Faster Case Resolution



Omni-channel Supervisor

Kanban Case View

Analytics

Self-Service

# Deliver a Completely Connected Self-Service Experience



Portals and communities built on the world's #1 CRM Platform

Easily embed business process from any system

Create simple, guided experiences with Lightning Flow

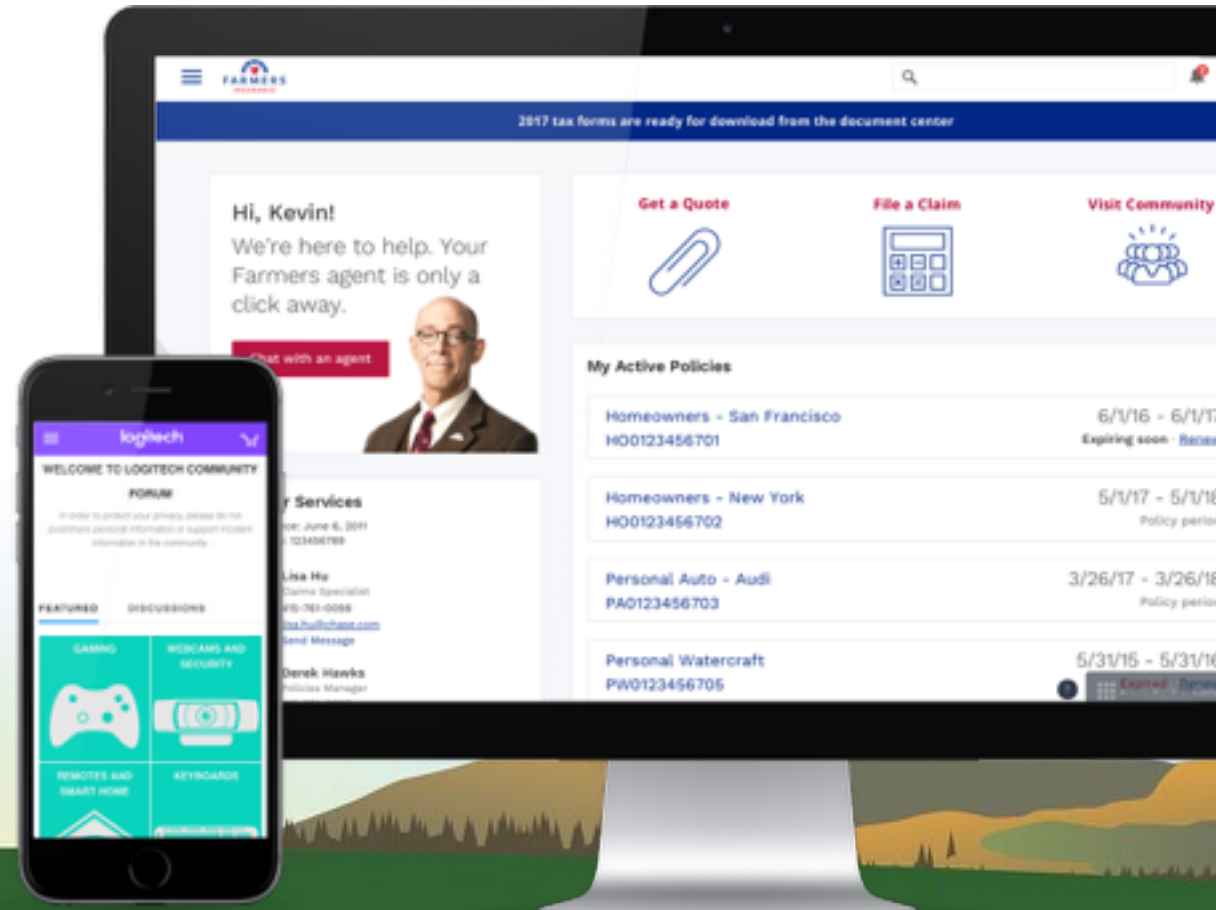
Provide intelligent service for every customer

Recommend relevant content, answers and experts

Build engaging experiences fast

Quickly build and deploy with Lightning Community Builder

Customer Portal



Self-Service Community

50%

Case Deflection

# Seamless Service Experience with Digital Engagement



Lightning Service Console

## Complete engagement

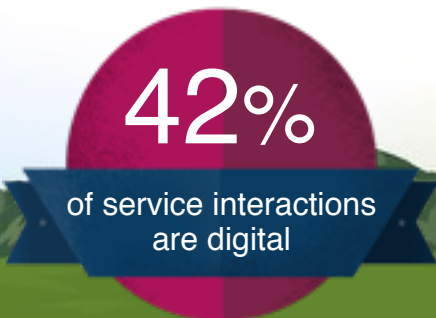
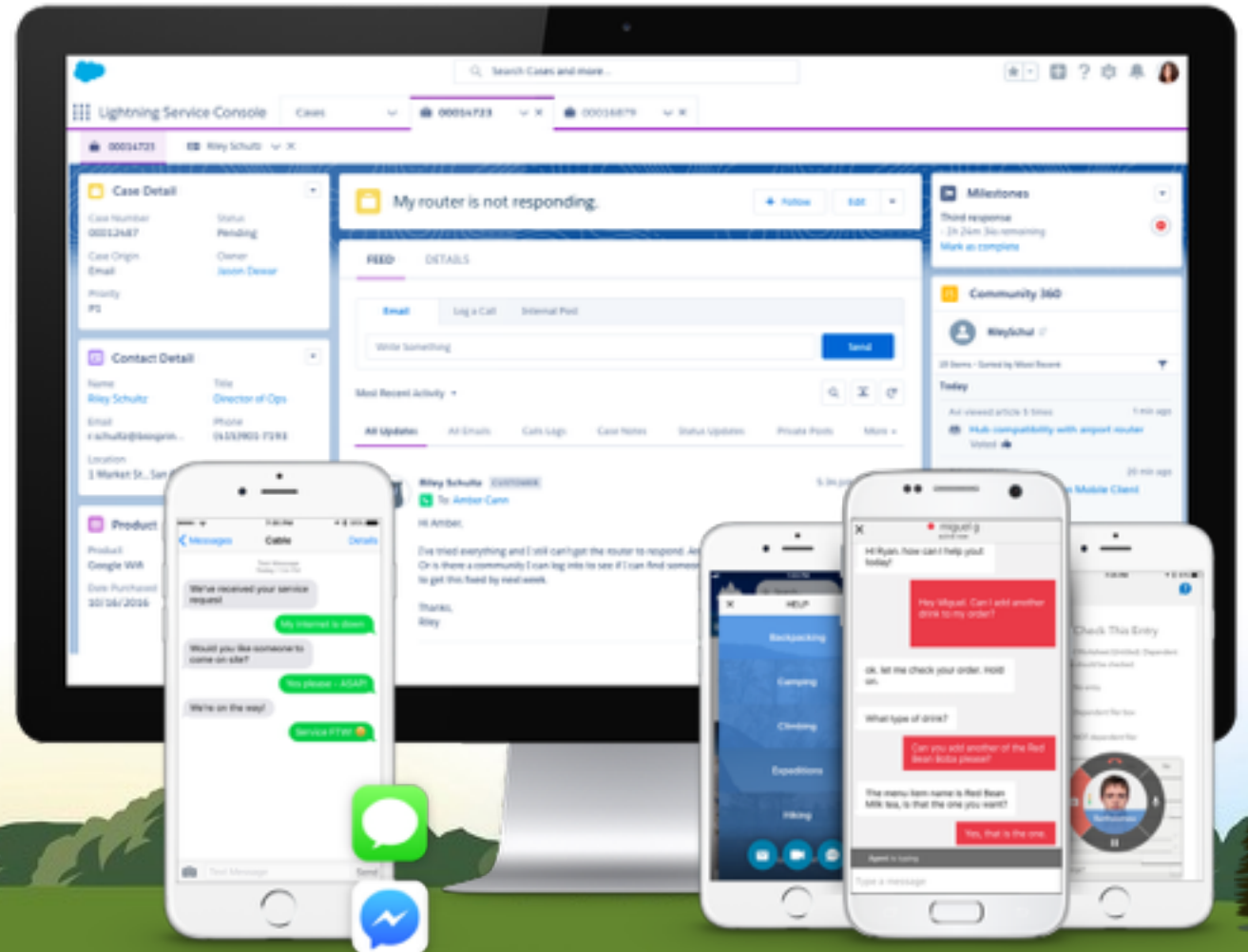
Engage with customers on any messaging, web, or mobile channel

## Consistent service

Satisfy customers by creating a consistent service experience across channels

## Connected to the #1 CRM

Drive agent productivity with a unified customer view and omnichannel workspace



LiveMessage

Mobile Snap-ins, Knowledge, Live Agent, SOS



AI for Service

# Scale Support with AI for Agents and Customers

PILOT



Built on the world's #1 CRM Platform

Einstein Agent

Deflect top requests

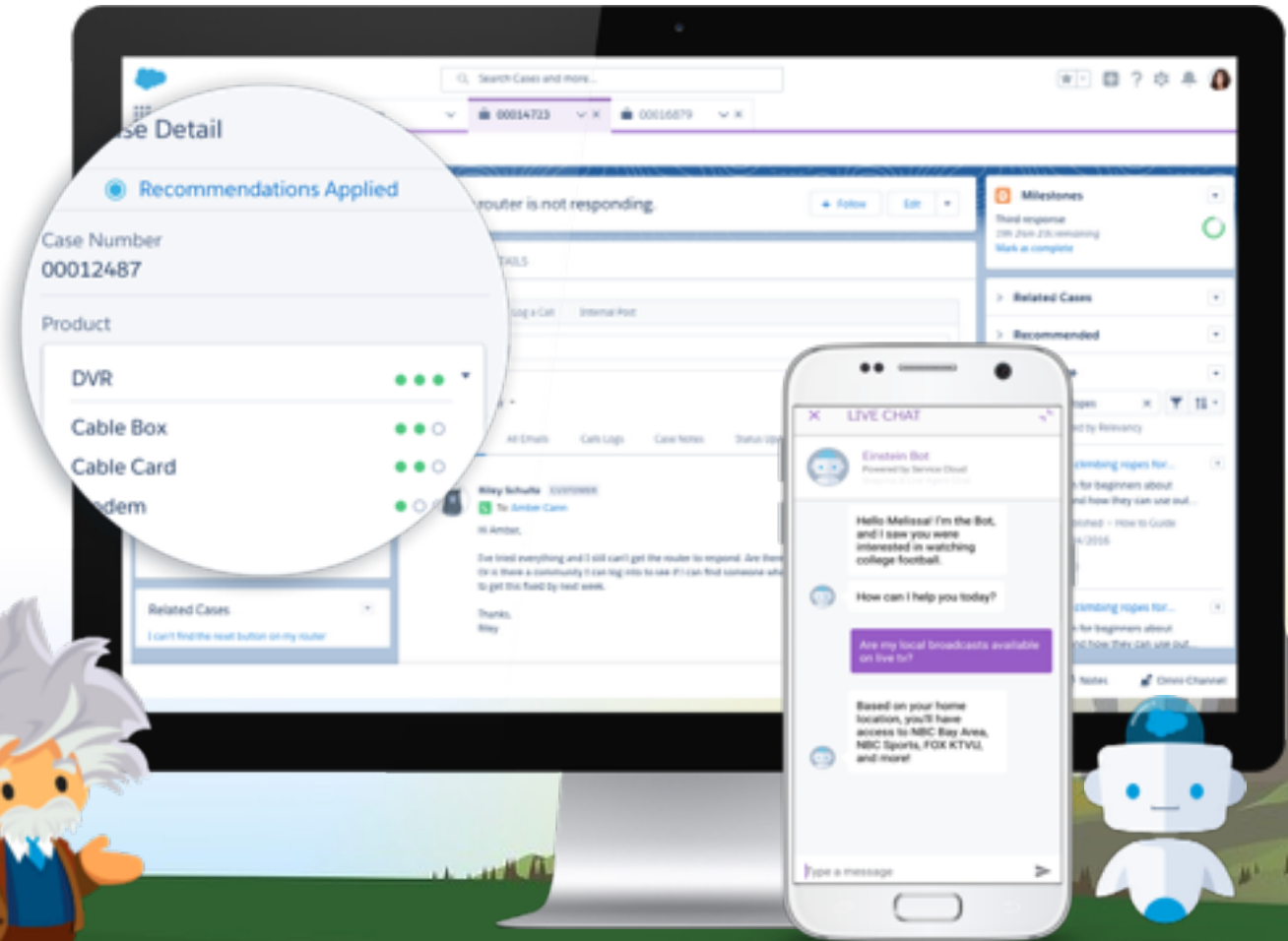
Qualify & resolve routine customer requests with Einstein Bots

Accelerate case resolution

Automatically understand, predict fields, and triage cases with Einstein Agent

Make self-service effortless

Put the right answers into your customers' hands the first time with Einstein Answers for Customer Communities



Einstein Bots

# Empower Service Managers with Deep, Actionable Insights



Gain business insights at a glance

Know where to focus and manage resources with pre-built dashboards

Uncover trends deep in the data

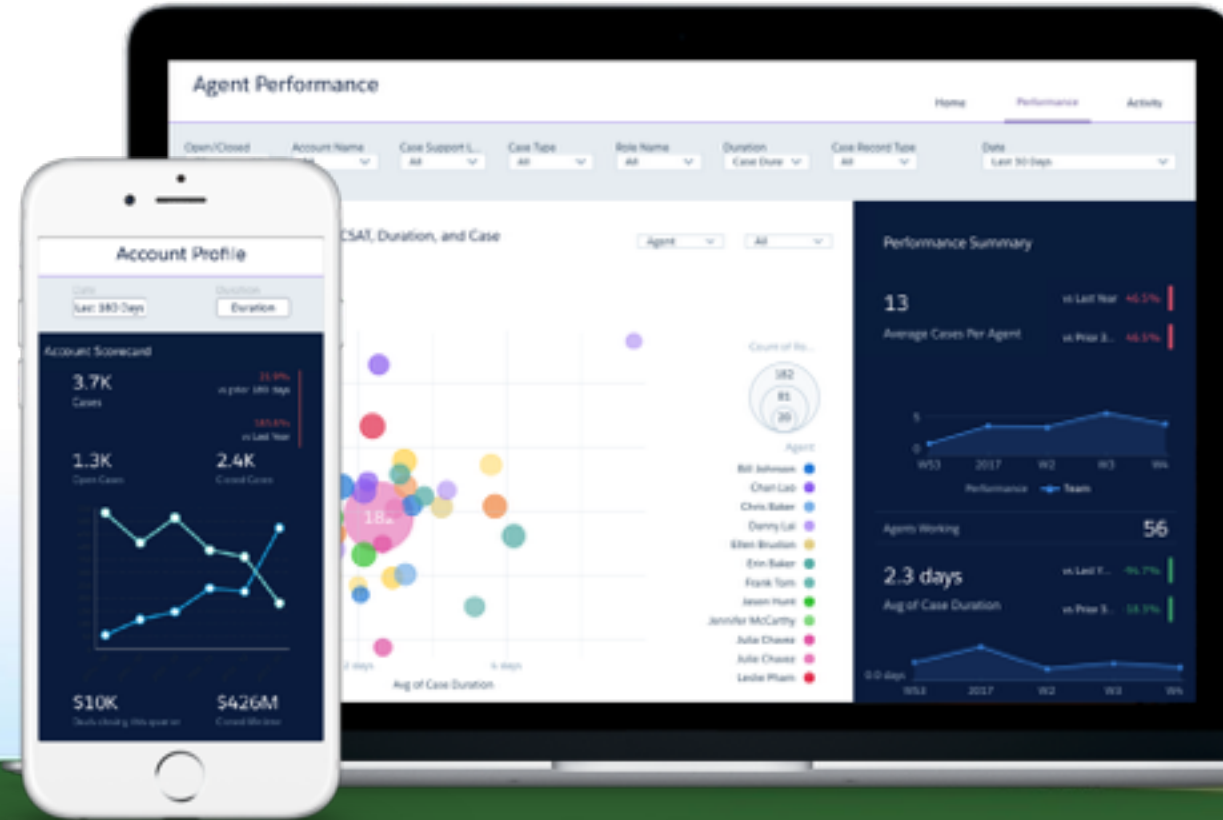
Automatically analyze data & patterns and get actionable recommendations with Einstein Discovery

Access insights from anywhere

Engage with service data on the Service Analytics Mobile App



Service Analytics Dashboard



Service Analytics Mobile App

# Transform Customer Service from the Phone to the Field



Field service on the world's #1 service platform

Connect field operations seamlessly to your business

Elevate work order and entitlement management with CRM

Intelligently schedule and optimize resources

Automate appointment booking and resource scheduling

Deliver a cutting-edge, offline-first mobile experience

Empower mobile employees with easy-to-use apps

Power proactive service with the platform

Take instant action with IoT data and service analytics

Dispatcher Console



Einstein Vision

iOS/Android App



# Service Cloud Keeps Getting Better



We release 3 times a year, these are our top innovations from the latest release

## Digital Engagement

Social Conversations Component  
Customizations for Web Snap-ins

## AI for Service

Einstein Bots **PILOT**

## Self-Service

Case Deflection Tracking  
1:1 Community Journeys

## Service Analytics

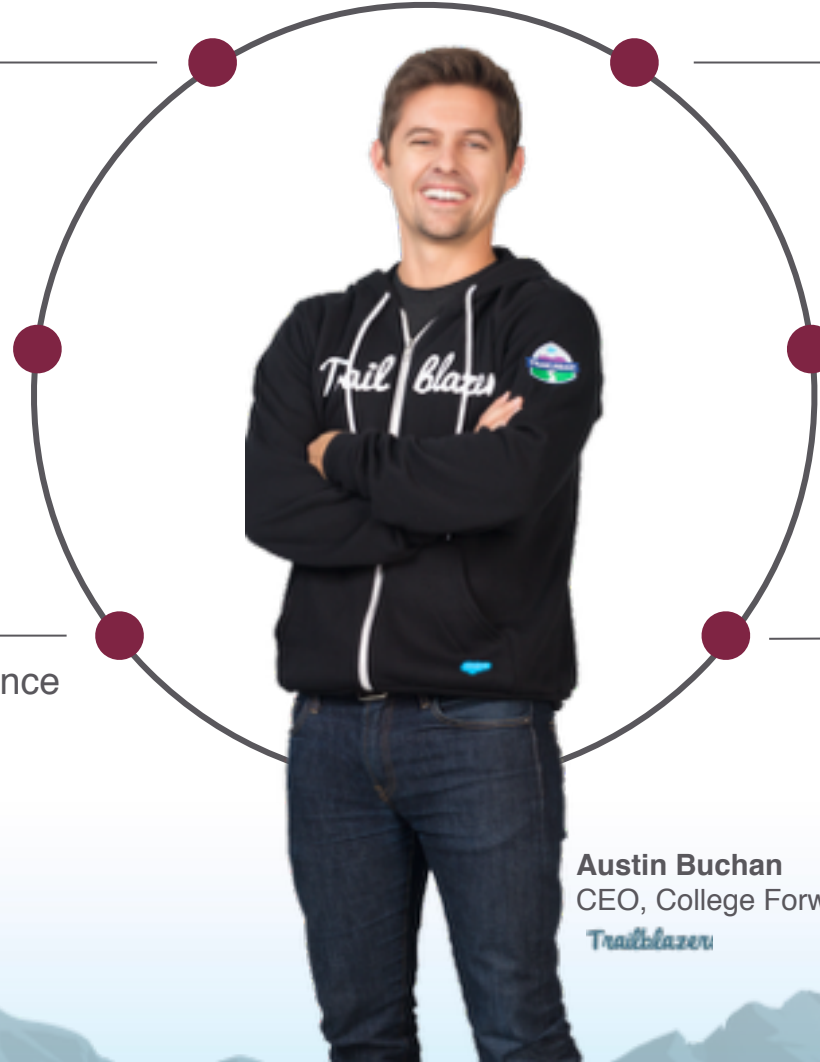
Report Builder in Lightning Experience  
Einstein Discovery Dataset Creation  
in Data Manager

## Customer Service

Mass Quick Actions in Lightning Experience  
Omni-channel Setup Flow  
Pinned Workspace Components

## Field Service

Return Order Management  
Crew Scheduling  
Guided Setup



**Austin Buchan**  
CEO, College Forward  
*Trailblazer*

[Check out our release site for more](#)

THANK YOU



# Salesforce is more than a Software subscription...



## Innovation



3 New releases per year  
100+ New Features included

## Community of Customers



Ideas for additional features

No Upgrades  
No Migrations



All 250K customers on  
same release

## Salesforce Platform



Configurable & Scalable

## AppExchange



+4K Applications

## Trailhead



Learning Platform

# Doing Well and Doing Good



FORTUNE  
FUTURE  
**50**

#1 The Future 50

HUMAN  
RIGHTS  
CAMPAIGN

Best Places to Work  
for LGBTQ Equality

FORTUNE

#1 The World's Best  
Workplaces

#1 Workplace for  
Giving Back

FAST COMPANY

The World's Most  
Innovative Companies

Forbes

#1 World's Most  
Innovative Companies

People

#1 Top 50 Companies  
that Care

