How to increase your top line with CRM Analytics

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Agenda

01 **How to increase your top line with CRM Analytics**
What is the state of data driven decision making today, how has it changed in the pandemic and how we can help you to increase revenue & decrease costs leveraging data within your CRM.

02 **Revenue Intelligence Demo**
We will demonstrate how a Revenue Intelligence supports the day to day operations of a Sales Leader by embedding actionable insight directly into their workflow.

Forward-Looking Statements

This presentation contains forward-looking statements about, among other things, trend analyses and future events, future financial performance, anticipated growth, industry prospects, environmental, social and governance goals, and the anticipated benefits of acquired companies. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, Salesforce's results could differ materially from the results expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: the impact of, and actions we may take in response to, the COVID-19 pandemic, related public health measures and resulting economic downturn and market volatility; our ability to maintain security levels and service performance meeting the expectations of our customers, and the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate performance degradation and security breaches; the expenses associated with our data centers and third-party infrastructure providers; our ability to secure additional data center capacity; our reliance on third-party hardware, software and platform providers; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy, cross-border data transfers and import and export controls; current and potential litigation involving us or our industry, including litigation involving acquired entities such as Tableau Software, Inc. and Slack Technologies, Inc., and the resolution or settlement thereof; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including any efforts to expand our services; the success of our strategy of acquiring or making investments in complementary businesses, joint ventures, services, technologies and intellectual property rights; our ability to complete, on a timely basis or at all, announced transactions; our ability to realize the benefits from acquisitions, strategic partnerships, joint ventures and investments, including our July 2021 acquisition of Slack Technologies, Inc., and successfully integrate acquired businesses and technologies; our ability to compete in the markets in which we participate; the success of our business strategy and our plan to build our business, including our strategy to be a leading provider of enterprise cloud computing applications and platforms; our ability to execute our business plans; our ability to continue to grow unearned revenue and remaining performance obligation; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; our ability to limit customer attrition and costs related to those efforts; the success of our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations, including as a result of acquisitions; our ability to preserve our workplace culture, including as a result of our decisions regarding our current and future office environments or work-from-home policies; our dependency on the development and maintenance of the infrastructure of the Internet; our real estate and office facilities strategy and related costs and uncertainties; fluctuations in, and our ability to predict, our operating results and cash flows; the variability in our results arising from the accounting for term license revenue products; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; the impact of future gains or losses from our strategic investment portfolio, including gains or losses from overall market conditions that may affect the publicly traded companies within our strategic investment portfolio; our ability to protect our intellectual property rights; our ability to develop our brands; the impact of foreign currency exchange rate and interest rate fluctuations on our results; the valuation of our deferred tax assets and the release of related valuation allowances; the potential availability of additional tax assets in the future; the impact of new accounting pronouncements and tax laws; uncertainties affecting our ability to estimate our tax rate; uncertainties regarding our tax obligations in connection with potential jurisdictional transfers of intellectual property, including the tax rate, the timing of the transfer and the value of such transferred intellectual property; uncertainties regarding the effect of general economic and market conditions; the impact of geopolitical events; uncertainties regarding the impact of expensing stock options and other equity awards; the sufficiency of our capital resources; our ability to comply with our debt covenants and lease obligations; and the impact of climate change, natural disasters and actual or threatened public health emergencies, including the ongoing COVID-19 pandemic.

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The gap between data strategy and execution

How Data Culture Fuels Business Value in Data-Driven Organizations - IDC 2021

Executives

Managers

Frontline Workers

What they want

83% of CEOs want their organizations to be more data-driven

87% of CXOs said being an intelligent enterprise is their top priority

What they have

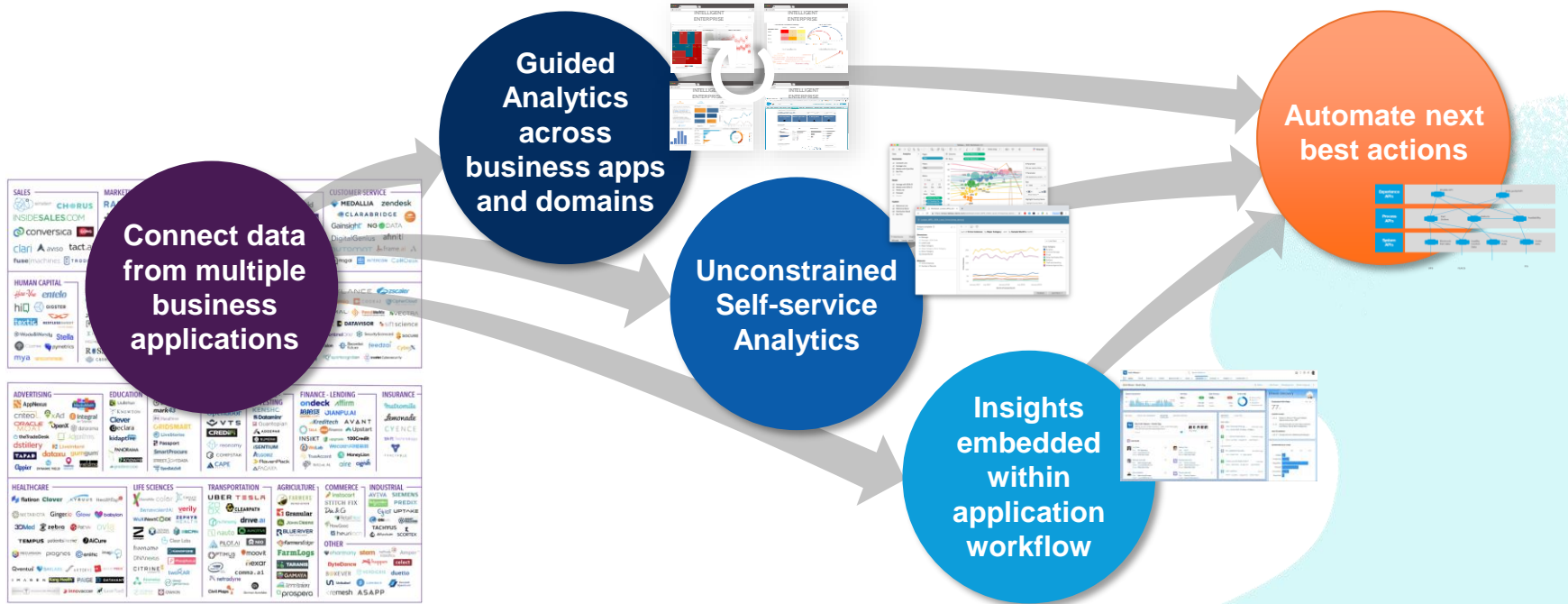**33%** are comfortable questioning KPIs and metrics used in organizations

29% are asked to communicate using data-driven methods

30% say actions are driven by data analysis

34% find it easy to find internal or external collaborator that can help

n = 455, Base = end users, Source: IDC survey, 2021

IDC

Analytics 360 Value Chain

Connect data from multiple business applications

Guided Analytics across business apps and domains

Unconstrained Self-service Analytics

Insights embedded within application workflow

Automate next best actions

Trust All Your Data, at Scale
- Ensure data is reliable, up-to-date and aligns to your security, governance and compliance standards

Make Better Decisions Faster
Empower everyone in your organization to see, understand and analyze all your data

Insights into Action
Provide insights where people work and take action in the flow of analytics.

You Now Have a Shorter Attention Span Than a Goldfish

What is CRM Analytics?

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CRM Analytics

Intelligent experience built for the world's #1 CRM

Discover the full story of your data

Connect external data with Salesforce data for a single view of your customer

### Uncover actionable insights built for your business

Infuse department and industry-specific native analytics into every business process and for every Salesforce user

Make smarter decisions in Salesforce workflow

Act and collaborate on transparent, AI-powered predictions and prescriptive recommendations for better business results

Scale quickly for your enterprise

Auto-scale across all users and billions of rows in seconds on the world's most trusted cloud
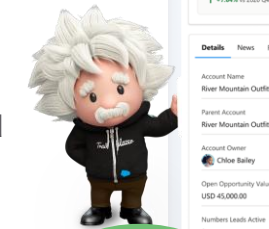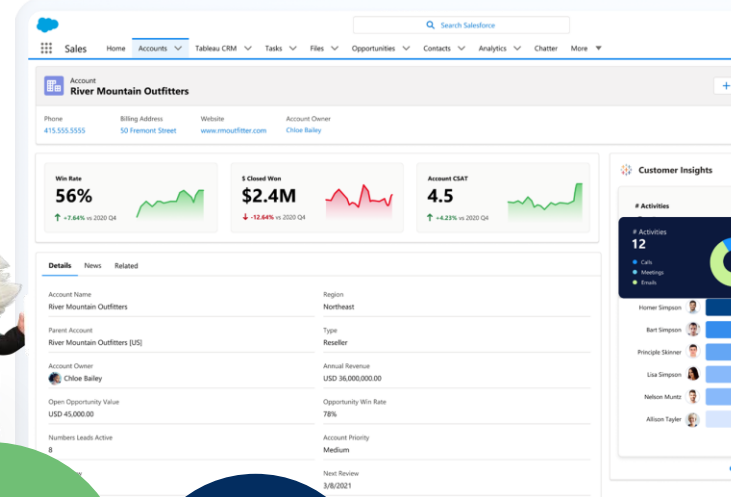
Formerly TCRM
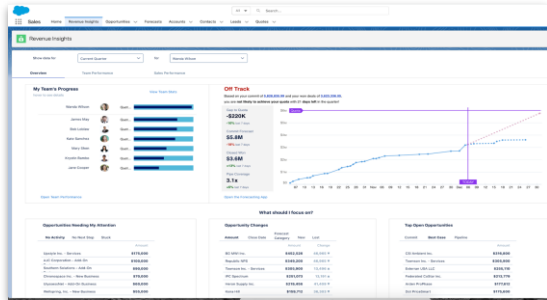
5x
Top line revenue impact If digital opportunities

8%
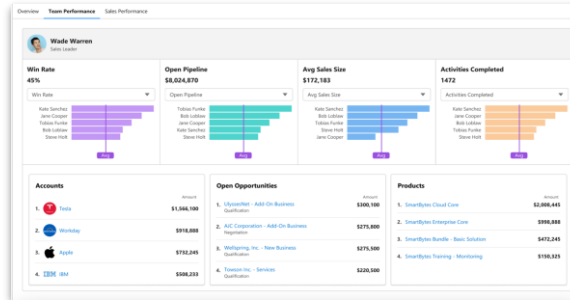increase in Salesforce user productivity

Schneider Electric

Revenue Insights Dashboards

Revenue Insights Overview

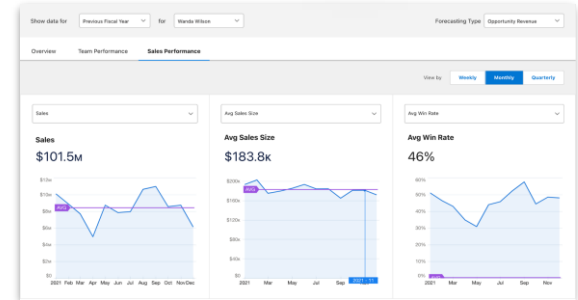Understand how you're tracking against quota in a single glance

Focus on high priority opportunities

Revenue Insights Team Performance

Compare team performance against key metrics

Drill down to see top accounts, opportunities, and products by rep

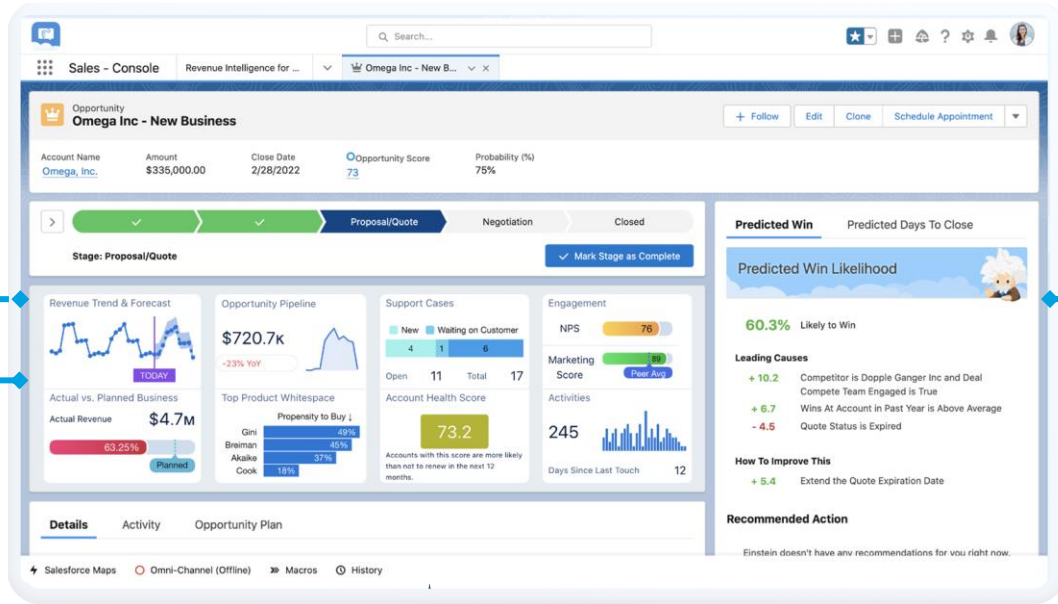## Revenue Insights Sales Performance

Uncover trends in sales performance by rep or team over time

Revenue Intelligence

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Infuse intelligence into every user's experience

Receive the right insights at the right time so you can act fast

What happened by combining Salesforce and external data.

What may happen with Einstein Predictions

Why it's happening with transparent, understandable explanation.

What to do about it with Action Framework so you can act from the point of insight.

Key Takeaways

How to improve your top line with CRM Analytics

01

Who is your end-user

Don't forget your end user.

If they are in sales or service, make sure to deliver insights in the relevant processes where they work - Salesforce Sales Cloud and Service Cloud
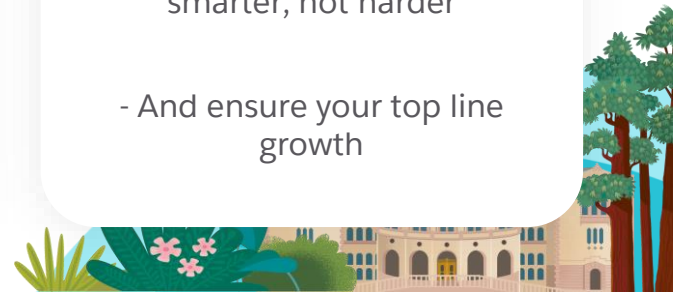
02

Integrated experience

Keep your users attention

Remove the need to flip between applications and rely on the individual ability to gain insight to action.

Curate and deliver them directly to the users who need them, your sales teams and service teams.

03

Never stop innovating

Implementing a process enhancement tool is not a one time fix. Make sure to continue to innovate, evaluate use-cases and multiply the business benefits from working smarter, not harder

- And ensure your top line growth

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