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White Paper



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Data Is Everywhere, But Insights Are Nowhere. What's Missing?

The question is no longer about whether you should unify your data or not, it's about how.

With the increasing amount of data generated constantly, organizations are surrounded by data more than ever. But the data holds the key to unlocking deeper insights, smarter decisions, delivering exceptional customer experiences, and more. Yet, many businesses struggle with a common challenge- their data is siloed and scattered across different systems.

Around 38% of organizations prioritize data insights and analytics investment to harness the power of data according to the Global State of Customer Experience Report 2024.

Despite these investments, multiple key challenges continue, preventing organizations from leveraging their data capabilities. The challenge is not just collecting data but it is about transforming it into actionable insights for growth.

Source: <https://www.cxnetwork.com/cx-experience/reports/global-state-of-cx-customer-experience>



Average number of the applications across the organization



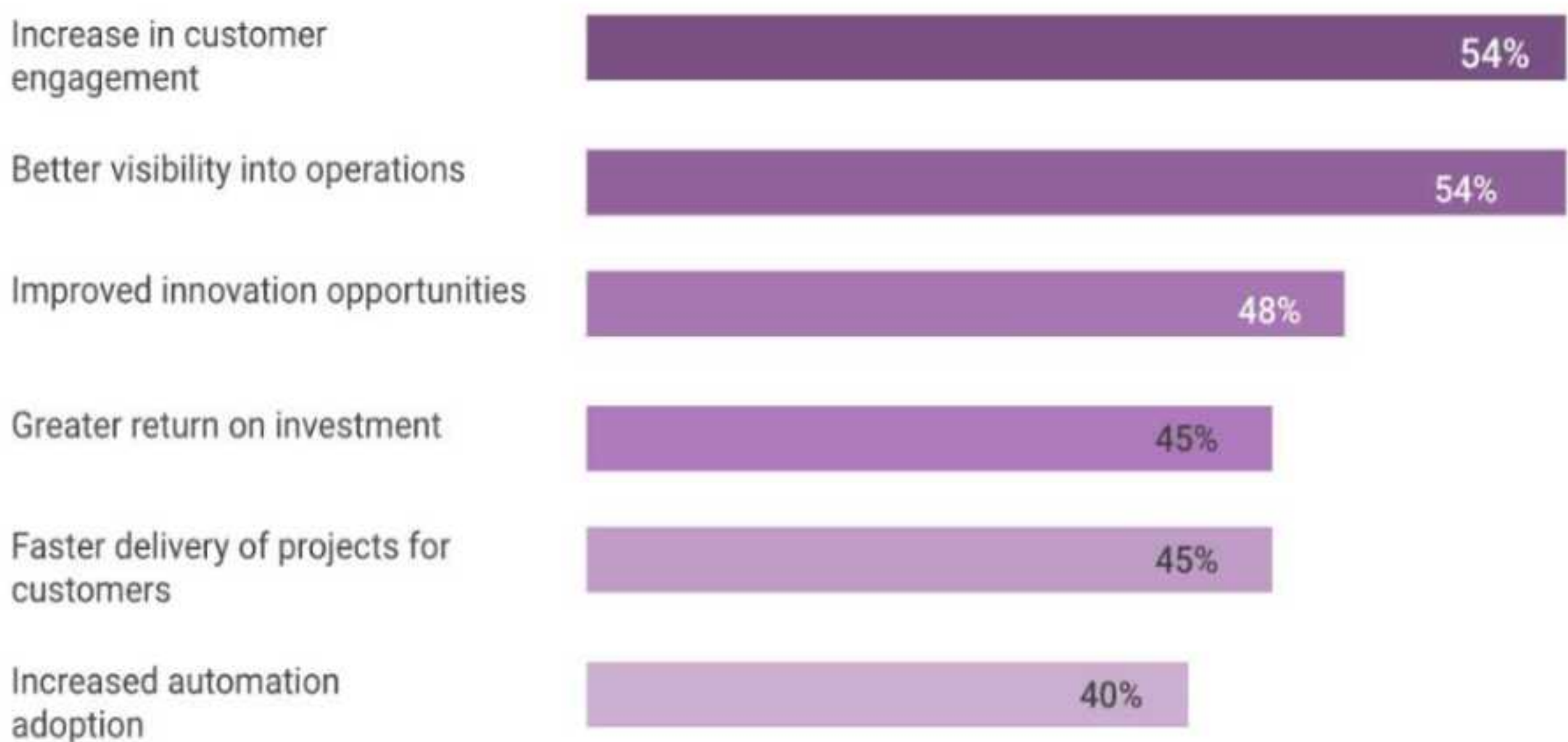
Average percentage of integrated applications

What Does That Mean?

By leveraging unified data, your businesses can break down these barriers. When you remove the silos, things get personal, and the customer feels more valued positively impacting the organization:

- 54% increase in customer engagement.
- 54% better visibility into operations.
- 48% improved innovation opportunities.
- 45% greater return on investment.
- 45% faster delivery of projects for customers.
- 40% increased automation adoption.

Source: 2024 Connectivity Benchmark Report from MuleSoft Research



The catch is that data in isolation is not worthy, but when unified and analyzed, it becomes valuable. This whitepaper explores how organizations can break down data silos, create data-driven strategies, and unlock new opportunities for growth and customer satisfaction.

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Salesforce: Unifying Data from Siloed for Smarter Decisions

Salesforce, one of the leading CRM worldwide, has been serving organizations since 1999 to eliminate data silos and develop a comprehensive view of their customers including all the touchpoints. This data unification allows businesses to make content relatable, personalized recommendations, and a more connected experience.

Salesforce provides the option to integrate apps, systems, and data sources. From low-code tools to developing custom API for integration, Salesforce lets you connect with all the services that you use.

Beyond data collection, Salesforce helps businesses improve decision-making through rich insights and drive better customer experiences across all touchpoints, thanks to data storage platforms like Salesforce Data Cloud.

Introducing Salesforce Data Cloud: The Power of Unified Data

Data Cloud is developed on the Salesforce foundational metadata layer, allowing seamless integration with a suite of Salesforce products and low-code platform services. Additionally, it offers more than 200+ connectors allowing integration with third-party apps and systems, including Snowflake, Databricks, Azure, and more.

In summary, Data Cloud is the solution to put trapped data from any source, be it internal or external, to work in Salesforce CRM, eliminating the need for building and managing difficult data pipelines.

See How Data Cloud is Fueling Personalized Experiences Daily

Casey, the fifth-largest pizza chain in the United States is leveraging the Salesforce Customer 360, and Data Cloud to create a single, unified record of each customer.

Today Casey has:

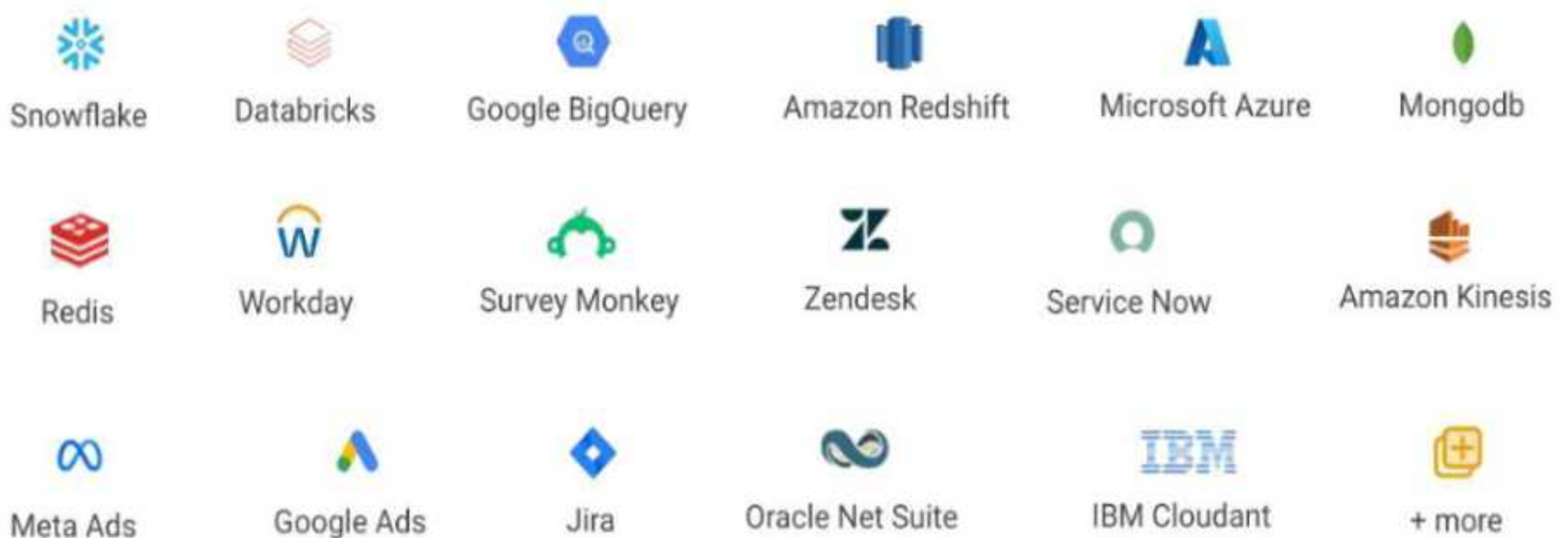
- **13 million customer profiles** in the Data Cloud over **150 profile attributes**
- **6 billion + engagement**
- Engaging five million loyalty program members with **200 million personalized messages.**

How Data Cloud Put Data From Any Source To Work?

Data Cloud offers two approaches to ingesting data from both native and third-party sources; source connectors, and zero-copy integrations. The job of these two approaches is the same, but the difference lies in their use case and implementation.

Source Connectors

Salesforce Data Cloud offers a wide range of connectors that enable data ingestion from 200+ apps, and systems. These connectors are native to the Data Cloud or offered through MuleSoft's Anypoint Exchange. Furthermore, the connector library is continually updating to include more apps and systems.



Source: <https://www.salesforce.com/in/data/connectivity/>

These connectors can handle any format of the data be it structured or unstructured. You can also choose how to connect your data i.e. batch, streaming, and sub-second real-time.

Zero Copy Integrations

Zero copy or zero ETL (extract, transform, load) allows you to access the data where it is stored without the need to move or copy the data. In simple terms, the team can access the data where it was originally stored in real-time. Zero-copy technology partners include AWS, Databricks, Google, Snowflake, IBM, and Microsoft.

Every Salesforce Cloud Gets Better With Data Cloud

Sales Cloud

Data Cloud is helping the sales team with unified and actionable data, allowing them to see the complete picture of what customers want and identify the opportunities to grow. According to the Salesforce State of Data Analytics report, "42% of sales teams have complete confidence in data accuracy when they use Sales Cloud and Data Cloud together. It helps them achieve higher conversion rates and improve sales forecasting accuracy.

Source: <https://www.salesforce.com/resources/research-reports/state-of-data-analytics/>

It provides a holistic approach to data management that includes information on prospects, customer accounts, and sales opportunities. Additionally, this data is readily accessible to all sales team members, so they can act upon it to build meaningful relationships with customers.

Here are the types of data that Data Cloud securely brings into your CRM, so your sales team can use it in the workflows and applications to deliver personalized information.

- Prior sales data also referred to as historical data helps to understand the recurring patterns in sales volume, buying behaviors, preferences, frequencies, and more.
- Third-party data from Amazon S3, Snowflake, and Microsoft Azure will be used to enhance the lead qualification.
- Data from ERP systems to help the sales team understand customer's billing cycle and subscription renewals.
- Data from Service Cloud, and other customer service-related platforms to help the sales team understand the issues faced by the customers, so they can take proactive measures to gain customer's trust.
- Web engagement data such as page views per session, time on sites, form submission, scrolling depth, etc. to identify the scope of improvements to improve the engagement rate.
- Marketing campaign data includes past and ongoing marketing campaigns (such as campaign performance metrics, customer engagement rates, and lead conversion rates) to help sales teams identify the most qualified leads to tailor strategies accordingly.

- Consumption data such as usage frequency, feature adoption rates, and product consumption patterns to identify upsell and cross-sell opportunities and anticipate customer needs.
- Unstructured data such as PDFs, transcripts, social media posts, emails, and more to build a comprehensive view of the customers.

This is how the Salesforce data cloud helps the sales team with the information they need in one place, so they can focus more on closing the deals, instead of knowing the customer.

Let's see how the Data Cloud eliminates the data silos and helps your sales team with the following benefits:

01 Discover Cross-Sell And Upsell Opportunities

A unified view of structured (purchase records, payment histories) and unstructured data (web engagement logs, social media interactions) helps the sales team drive cross-sale and upscale activities.

For example, the unified view of customers' historical purchases and transaction information will help the sales team to identify the possibility of that customer purchasing in the future. The sales team can prioritize high-value customers and align their resources accordingly to bring in more revenue.

02 Identity High-Quality Leads

Data Cloud leverages the combination of data integration automation and AI to help teams to identify high-quality leads. With the help of AI, Data Cloud rates each lead from 1 to 5 based on the quality and the likelihood of buying. This rating is determined by analysis of the customer interaction across sales, marketing, and other touchpoints. Additionally, it creates the dynamic segmentation of the customers who recently showed buying intent by ingesting web engagement data like pricing page visits.

This allows the sales team to prioritize which prospects to target, when, and what offers might attract them. Additionally, the sales team can identify prospects with less intent to make a purchase and engage with them with the help of AI, and automation until they're not ready to make a purchase.

Leveraging AI and Data to Prioritize Leads More Effectively

“Bombardier, a leading name in the business jet manufacturers industry headquartered in Montreal, Canada. The company was facing challenges in identifying when its stake clients were ready to purchase due to legacy systems, and disconnected data.

With Data Cloud, Bombardier can quickly identify and engage with customers ready to buy based on factors such as wealth information and major financial events such as mergers and IPOs. Additionally, Einstein Lead Scoring provides detailed insights into high-value customers.

[Start Prioritizing Leads Today!](#)

Service Cloud

Data Cloud is helping your service team solve more cases rapidly and deliver proactive service. It helps service agents focus on solving customer inquiries instead of hunting down customer information across multiple applications. According to the 6th edition State of Service report, organizations leveraging data cloud and service cloud together resolve 54% of customer issues through self-service tools, leading to increased agent productivity and customer satisfaction.

Source: <https://www.salesforce.com/resources/research-reports/state-of-service/>

Here are some of the data that are collected by the Data Cloud and made accessible to all service agents, so they can act on it:

- Service data such as purchase history, historical customer interaction with the service team, and customer feedback from all the Salesforce orgs used across the organization.
- Web engagement data such as previous support requests, self-service usages, traffic sources, and user flow enable service agents to tailor their support to match engagement patterns.
- Unstructured data such as call center transcriptions, chat transcriptions, customer reviews, social media posts, and more third-party sources.
- Detailed product information and inventory information to ensure the service team can provide precise product-related information and its availability status.

Let's see how the centralized and easy accessibility of information helps service teams.

01 Proactive Service Scheduling

Data Cloud enriches the service team with well-governed data, enabling AI to keep track of the asset's health score. When the health of the assets drops, the service team will be notified immediately to ensure proactive support.

02 Driving Cross-Sell, And Upsell Business

The unified data can help the service agents find opportunities for equipment replacement, and upgrade. With unified information, they can help the customers know the need for upgrades, so they can make informed decisions.

03 Enhanced Personalization

The integration of the data from all the sources helps the service agents to deliver tailored support, boosting the customer experience. Additionally, the ongoing analysis of customer interactions and feedback helps the service team to keep improving to meet expectations.

Einstein AI can write automated, and personalized service replies grounded in the customer data to ensure customers feel valued, and find the answer to their questions.



Marketing Cloud

Making sense of customer behavior is the key to improving ad click-throughs, reducing service cases, and lowering the number of abandoned carts. This can't be done without understanding the data. According to the Salesforce 9th edition State of Marketing report, "around 50% of marketing teams utilize unified data with the help of Data Cloud and Marketing Cloud for high-performance marketing.

However, in today's time, the customer's concern over privacy and the loss of third-party cooking make it hard to connect, harmonize, and engage with the data.

Here is how Data Cloud can help markets understand their customers and provide what they need when they need it-

01 First-Party Advertising

Data Cloud helps marketers to collect consented data directly from the marketers. It can be integrated directly with the world's biggest marketing advertisers, including LinkedIn, Google, Meta, and Amazon. The first-party advertising data ensures that each customer receives the right message at the right time, boosting advertising ROI. Additionally, it allows you to suppress ads when it is not the right time, for example, a customer who recently made a purchase. This data-driven marketing reduced wasted resources and generated better results out of each penny spent on marketing.

02 Data-Driven Customer Journeys

With real-time data consumption from all the sources, the Marketing Cloud ensures more relevant, and timely experiences. The click-and-drag interface allows the users to click on the field from the source, and drag it in the corresponding field of Data Cloud.

This data-driven customer journey enables intelligent automation-like behavior-based triggering and dynamic segmentation. For example, if the customer is not using the key product features, an educational journey can be triggered.

03 Calculated Insights

Data Cloud helps marketers keep track of metrics like customer lifetime value analyzing the historical data. These metrics are combined with the customer data (demographics, behavioral patterns, preferences) to understand the customer and segment performance.

The Power of Data Cloud is Benefiting the Suite of Salesforce Marketing Products

- Marketing Cloud Engagement
- Marketing Cloud Account Engagement
- Marketing Cloud Personalization
- Marketing Cloud Intelligence
- Loyalty Management
- Referral Marketing
- Marketing AI

Commerce Cloud

In today's time, when 65% of consumers expect companies to meet their evolving needs and preferences, actionable insights are imperative to propel the business forward. Data Cloud is helping companies of all sizes to build richer and more personalized experiences for their customers.

01 Personalize Every Experience

The integration of Data Cloud and Commerce Cloud is helping eCommerce companies to delight today's digital-first consumers with personalized experiences. It enables contextual promotion to ensure the right shoppers receive the right message. For example, if a customer frequently shops for sports accessories, they might get a notification for the new sports collection. Similarly, if a customer recently purchased a smartphone, they might receive promotions for headphones or cases.

Tailored pricing can also be applied to value the long-term customers, increasing their loyalty and cart value.

02 Predictive Demand Forecasting

With the help of Einstein AI, Data Cloud can act on historical sales data, seasonal trends, and external factors that can drive the demand to make accurate forecasting. These demand forecasts can be made at various levels of granularity:

- Product or product category
- Geographical region
- Customer segment
- Time period

03 Improve Merchandiser's Productivity

Leveraging Einstein AI-powered analytics, Data Cloud can generate actionable insights that help merchandisers make data-driven decisions. For example, merchandisers can identify the underperforming products and improve their placing or marketing strategies.

These insights can also help reduce return rates by compiling and acting on the common reasons for returns.

How We Work With You To Put The Certified Salesforce Technology Professionals Behind Your Success?

The prominence of data is rising with each passing day, setting the pillar for success. Here at Cyntexa, we have been helping organizations from small startups to Fortune 500 companies to build a meaningful relationship with their customers supported by the world's #1 CRM, Salesforce. With Data Cloud, we take your customer engagement to the next level and simplify the process of delivering personalized experiences. Your journey to becoming a data-driven organization begins with a conversation with Cyntxa. Let's connect with us to start your journey.

About Cyntexa

Cyntexa is a trusted partner in delivering innovative solutions that empower businesses of all sizes to thrive in the digital age. Driven by more than 400+ tech professionals, Cyntexa is offering a suite of Salesforce services, including consulting, implementation, integration, and customization to managed services. Ultimately, they are the one-stop shop for all the things related to Salesforce.

Learn more about Cyntexa by visiting: <https://cyntexa.com/>