



Agentforce for Marketing

Joanna Moss

Marketing Director, Strategic Accounts
joanna.moss@salesforce.com



Agenda

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1 **ABM at Salesforce and our Strategy**

2 **ABM Account Selection**

3 **ABM in action - Tools and Tactics**

4 **ABM Sales & Marketing Alignment**

5 **ABM on Salesforce**

6 **ABM Data & Measurement**



The marketing funnel is “dead” in favour of customer-led journeys

But you cannot scale personalised relationships without AI

On average,
consumers engage
with companies
across **8** channels.

Marketers use an
average of **9** tactics
across the entire
customer journey.

Legacy systems

Tactical execution

Trust in AI-powered
decisioning

43%

of marketers still take a
**fragmented approach to
personalisation**

*demonstrating an understanding of
customer needs at certain points and
using mass
messaging at others.*

Our Core Belief

Automation is at the center of a marketer's ability to grow customer-led relationships... and **intuitive AI designed for marketers is *the* automation vehicle for efficiently creating and personalising customer experiences** as it provides crucial **scalability** at every step in a journey.

What Does Success Look Like?

Data-Driven Team for Efficiency, Scale and Customer Focus

Measure ROI

Ability to understand the accurate **return of marketing dollars** in creating engagements that **generate and close deals**

Optimise our marketing


Know where our \$\$\$ should be spent to **generate more pipe/revenue** and the specific tactics to use to **move deals forward to close**

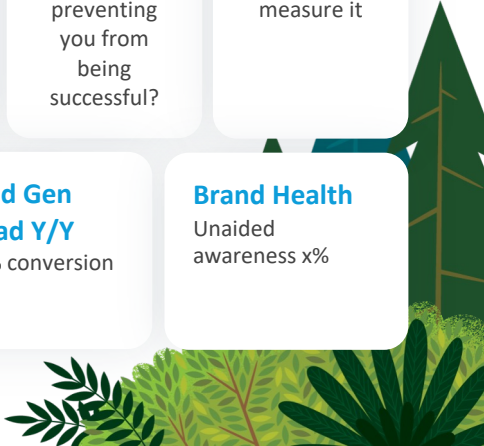
New Insights

Learn about the **selling journey** to optimise **how sales and marketing work together** to create and close deals and **make data-driven marketing decisions**

Achieve targets set out in V2MOM 

 Vision What do you want to achieve?	 Values What's important to you?	 Methods How do you get it?	 Obstacles What is preventing you from being successful?	 Measure How will you measure it
--	--	---	--	--

 Grow MDP x% Y/Y x% contribution	X% Y/Y MMA contribution	Demand Gen +X% lead Y/Y with +x% conversion Y/Y	Brand Health Unaided awareness x%
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Go To Market Strategy



Industry Focus and Segmentation

GTM Strategy

Blend Industry focus with Segments



Sales Organisation

- Specialised Account Teams
 - Dedicated Quotas
 - 1-1 Customer:Account Executive
-
- General, mid-market sales motion
 - Hunting and farming
 - Access to senior leadership
-
- High velocity business
 - Pooled customers
 - Serviced from shared centre



Go To Market Strategy



Industry Focus and Segmentation

GTM Strategy

Blend Industry focus with Segments



Marketing Tactics

- Focus on ABM
 - Invest in C-suite experiences
 - Activations with an industry focus
-
- Drive combination of in-person and virtual events
 - Segment campaign audience
-
- Target audience at scale
 - Develop virtual, repeatable plays



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Marketing at Salesforce

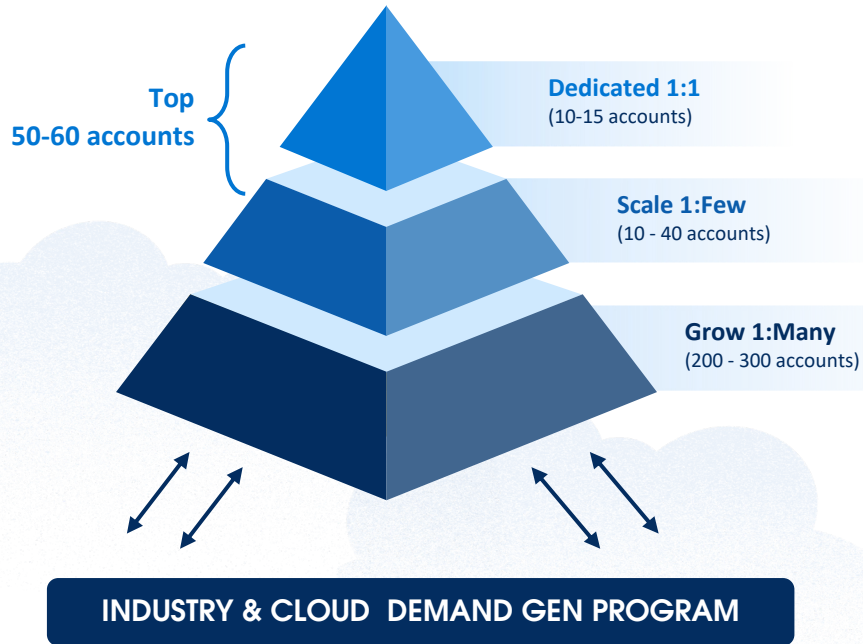


We Treat Individual Accounts as Markets in Their Own Right

- 01 **Building trust** between sales, marketing and the customer
- 02 **Deepening customer relationships** by supporting the entire sales journey from pipe generation to post sale
- 03 **Scale for impact** with a focus on 1:1 for top accounts aligned to company growth strategy
- 04 **Powering personalization** through tailored insight-led campaigns (even at the contact level)
- 05 **Delivering business impact** by focusing on the 3R's: Reputation, Relationships, Revenue



ABM Strategy: Program Overview



Dedicated 1:1

- Account research & insights
- Social Intent dashboard
- Deep C-suite engagement - priority invites
- Personalised bespoke content & videos
- Always on digital content program
- Dedicated Account Microsite
- Executive Briefing Centre
- Account specific metrics built around identifiable goals within the program plan
- Personalised direct mailing

Scale 1:Few

- Executive profiles - Boardroom insiders
- Social Intent
- Deep C-suite engagement - priority invites
- Personalised direct mailing
- Executive Briefing Centre
- Always on digital content program
- Focus on 3R measurement (Reputation, Relationship, Revenue)

Grow 1:Many

- Leverage Exec program & strategic events for broad c-suite engagement
- Data & Digital focus with paid digital
- Build specific targeting into industry GTM campaigns
- Personalised direct mailing
- Focus on 3R measurement (Reputation, Relationship, Revenue).
New logo target

Executive Programs

Top 100 AOV accounts & Top open pipe

Key focus for exec and hospitality program



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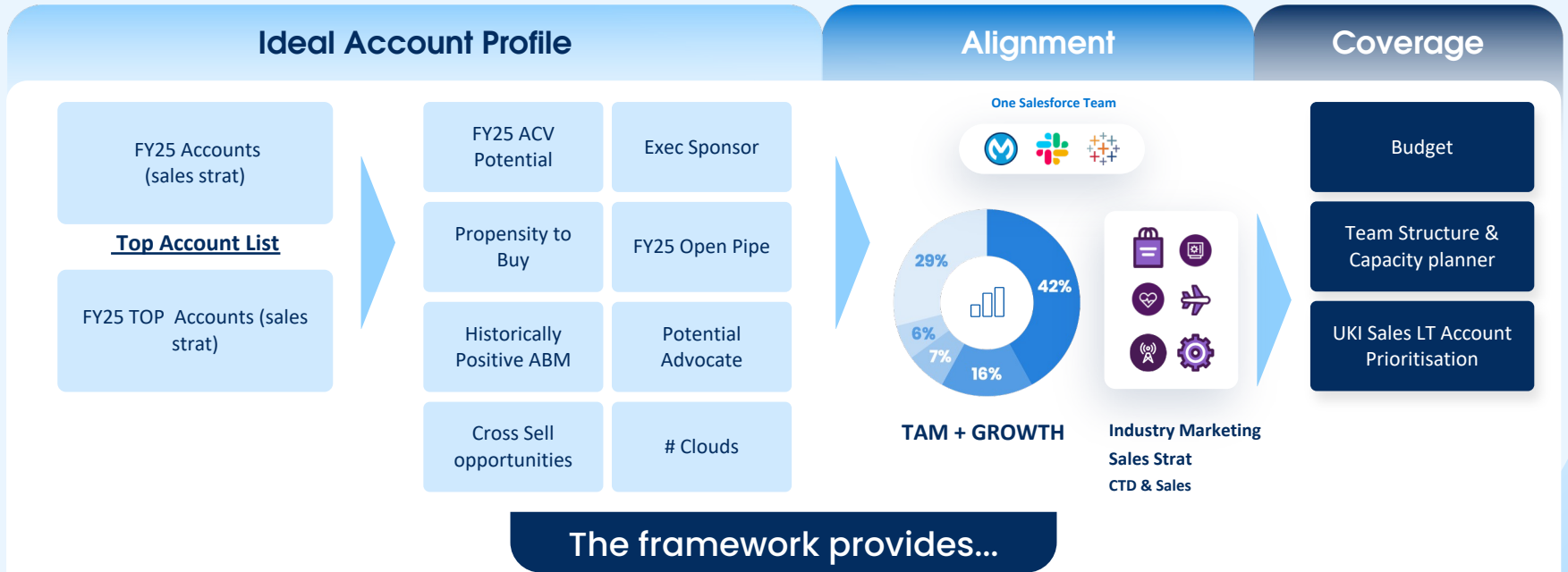
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ABM Strategy: Account Selection Methodology



Visibility to top customers and account teams for priority resource alignment



Improved alignment between acquisitions and core



Single source of truth for top customer data and analytics (e.g., standardized tracking and integrated dashboards)



ABM Strategy: Data Driven Account Segmentation

01

Decisions are based on two factors

- Attractiveness of the account
- Relative business strengths

02

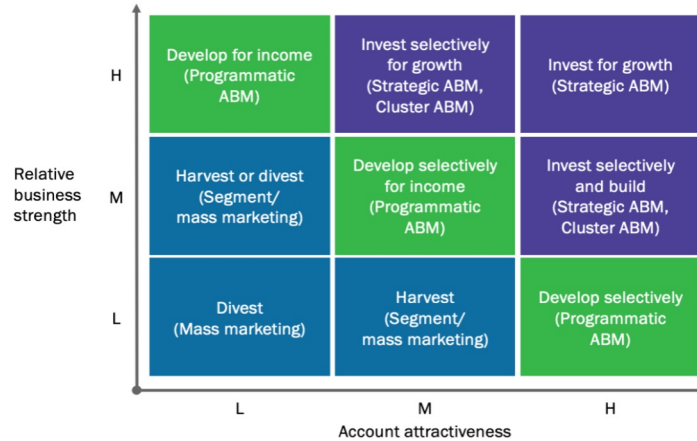
Criteria agreed by all to define and measure both factors

03

Accounts are scored against the criteria

04

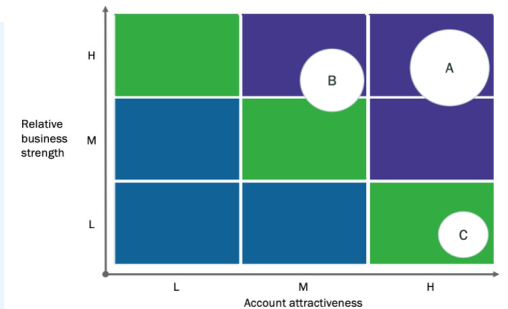
The resulting prioritisation guides collaborative decisions making about where to invest ABM resources



A - The top right-hand - strategic ABM (account A)

B - more suited to cluster ABM (account B)

C - more suited to programmatic ABM approach (account C)



How AI Helps Find the Accounts that Matter Most



For 1:few, programmatic or 1:many ABM

Taking the guesswork out of identifying sweet spots

Moving away from manual processes, to using predictive AI to identify your best accounts/contacts & generative AI to create more effective segments, faster.



Segment Creation



Look-alike Modeling



Scoring



Calculated Insights



Key Account Identification



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ABM 1:1 Journey Process



CEO & PR

Exec Programs

CCO

Ignite

Creative

Customer Success

SIC

Exec Sponsor

ABM Activities

- Account Planning/DeepDive
- PowerMap/ Executive Profiling
- Social Listening

- Rally Cry
- Executive Enablement Assets
- Messaging

- Journey So Far - Introduction Video
- Executive Engagement program prioritisation
- DF / LWT program prioritisation
- Paid Digital / Awareness
- Bespoke Account Tactics + Cluster activity
- VIP Events/Hospitality / joint VTO
- Super-SIC

Insights & Foundations

Positioning

Account Journey Execution

Milestones & Events

Q1

Q2 / 3 / 4

Kickstart / Account Plan

Company Insights / Exec Insights

ABM Marketing Plan/ Engagement Plan

London World Tour

Dreamforce

Power Map

Exec Sponsor Agreed

E.g Renewal due / SIC

Dreamforce to You

ABM Examples

Innovation Days, Trailhead challenges & bespoke Microsites

Innovation Days



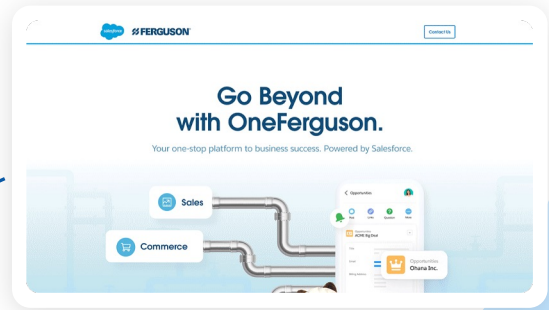
Drives Demand

Trailhead Challenges



Drives Adoption

Personalised Microsites



Enrich account relationships with an always-on home base.



ABM Reference Guide and Tactics Menu

Resources and use cases to tailor ABM program aligned to account priorities



Research & Planning	Bespoke Platforms & Targeted Channels		Events	Thought Leadership	Sales Tools	Success Reporting	
<p>RESEARCH & PLANNING</p> <p>Planning and messaging framework and insights on buyer propensity</p>	<p>VISUAL IDENTITY</p> <p>Bespoke creative execution for the account, videos, templates, and branded collateral</p>	<p>PAID & ORGANIC SOCIAL MEDIA CAMPAIGN HIGHLY TARGETED</p> <p>Linkedin campaigns, custom messages</p>	<p>EVENTS, HOSPITALITY SPEAKER OPPORTUNITIES</p> <p>Industry events. Prioritization VIP Access</p>	<p>ALIGNED VALUES BASED MARKETING</p> <p>Align to account values; Participate joint philanthropic activities.</p>	<p>SOCIAL MEDIA CONTENT</p> <p>Linkedin Profile refresh</p>	<p>SUCCESS STORIES</p> <p>Customer Success Showcase</p>	<p>BUSINESS VALUE</p> <p>Solution ROI Analysis in partnership with Business Value Services</p>
<p>STAKEHOLDER PROFILING</p> <p>Insights, connections audit</p>	<p>STAKEHOLDER ENGAGEMENT PLANS</p> <p>Relationship Roadmaps for key clients</p>	<p>EMAIL & DIRECT MAIL CAMPAIGNS</p> <p>Bespoke email campaign targeting key clients with relevant content</p>	<p>BESPOKE EVENTS/ WEBINARS</p> <p>Product/Solution Showcases</p>	<p>BESPOKE THOUGHT LEADERSHIP</p> <p>SIC's, Round Tables Bespoke Content</p>	<p>SALES ALERTS</p> <p>Buyer Intent Activities Funnel Handraiser Reports</p>	<p>BID SUPPORT</p> <p>OCM tactics. Eg exec summary, video, microsite, branded collateral/slides</p>	<p>JOINT AWARD SUBMISSION</p> <p>Collaborative submission with client for relevant industry award</p>
<p>ACCOUNT SEGMENTATION</p> <p>Account specific audience segmentation</p>	<p>COMPETITIVE INTELLIGENCE</p> <p>Insights on competitor positioning, pricing, etc.</p>	<p>BESPOKE WEB PAGE/ MICROSITE</p> <p>Cohort or 1:1</p>	<p>TARGETED DIGITAL ADVERTISING</p> <p>Display ads targeted by IP/ geo/ programmatic</p>	<p>EXTERNAL INFLUENCES</p> <p>Activate Influencers & Trailblazer to increase credibility Bird of a Feather</p>	<p>MOMENTS THAT MATTER</p> <p>Relationship building outreach campaigns</p>	<p>SALES ASSETS</p> <p>Email Signature Brochures, websites, videos and other tactics to support client meetings</p>	<p>ABM MEASUREMENT</p> <p>3R's: Reputation, Relationships Revenue</p>

Digital Save the date Mailer

About

Send a curated list of events to get the conversation started with Prospects and Customers (examples below). This asset is made for AEs and BDRs who want to:

- Give customers a roadmap of events this year
- Introduce themselves to a new account in their patch
- Reach out to a Prospect/New Logo or new contact (can be sent as an InMail)



Upcoming Events

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World Tour London

June

British Trailblazers will take center stage in London, joined by experts to unpack how AI is changing the game across industries. Whether you are new to Salesforce or have known us for a while, this is the learning event for you.

6 JUNE

Contact your Account Executive to know when registration opens



17-19 SEPTEMBER, SAN FRANCISCO AND ONLINE

Dreamforce

September

The biggest Salesforce event of the year, and certainly not one to miss. Join us for an epic celebration of customer success, plus all the learning, connecting, and giving back in our hometown in San Francisco.

Save the date



Say Thank You in a Personal Way



A scalable, 1:1 approach to thank our customers for their partnership and put key dates and events on their radar for the year ahead.

Customisable by country leader and AE message, as well as account specific reflections.

Developed on a microsite for an interactive look and feel.

2 personalised videos

Zahra Bahakaloumi
CEO UK Satellite
Click below to hear a short message from Zahra

James Hickinbottom
Centrica Account Lead
Celebrating our flourishing partnership - and Centrica's success!

Happy holidays!
We've compiled all our favourite moments with you here.
So, what do you say?
Can we have the last scroll of 2023?

Yes 🎁

Hero account moments

Tracy Beighton
Santander Account Executive

This was a busy year, and it wasn't easy to select just 5 highlights. As always, we're here to help you make the most of the Salesforce platform. Drop me a line if you need support!

🏆

What a Year!
Our top 5 highlights
from the Success Team.

Santander

Donation to charity

To help those who need it most this holiday season, we have made a charitable donation to **Action for Children** to provide clothes and bedding to keep a child warm this Winter.

Action for Children

Make Your Customers Feel Seen and Heard



1:many approach to digital advertising for dynamic personalisation.

After the upfront insights and research has been conducted, we use digital capabilities to pull out account names based on IP targeting.

Now everyone can be an Einstein at Vodafone.
Trusted AI from Salesforce.
[Learn more](#)

salesforce

This advertisement features a woman with long dark hair and a young boy with white hair, both smiling. They are set against a dark blue background with a glowing green Einstein logo and stars.

Now everyone can be an Einstein at Rolls-Royce.
Trusted AI from Salesforce.
[Learn more](#)

salesforce

This advertisement features a woman with long dark hair and a young boy with white hair, both smiling. They are set against a dark blue background with a glowing green Einstein logo and stars.

Now everyone can be an Einstein at M&S.
Trusted AI from Salesforce.
[Learn more](#)

salesforce

This advertisement features a woman with long dark hair and a young boy with white hair, both smiling. They are set against a dark blue background with a glowing green Einstein logo and stars.

Turn 94% of Britvic customers into repeat buyers.
[Find out more](#)

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State of Service

Source: 2022 Salesforce Success Metrics Global Highlights.

This advertisement features a cartoon bear character and a woman. The background is light blue with a gear icon and a thumbs up icon.

Improve PepsiCo, Inc. sales targeting by 89%.
[Learn more](#)

salesforce

State of Marketing

Source: 2022 Salesforce Success Metrics Global Highlights.

This advertisement features a cartoon bear character and a woman. The background is light blue with a magnifying glass icon.

Hi, <Example company name goes here>. See Manufacturing Cloud for Service in action.
[Watch now](#)

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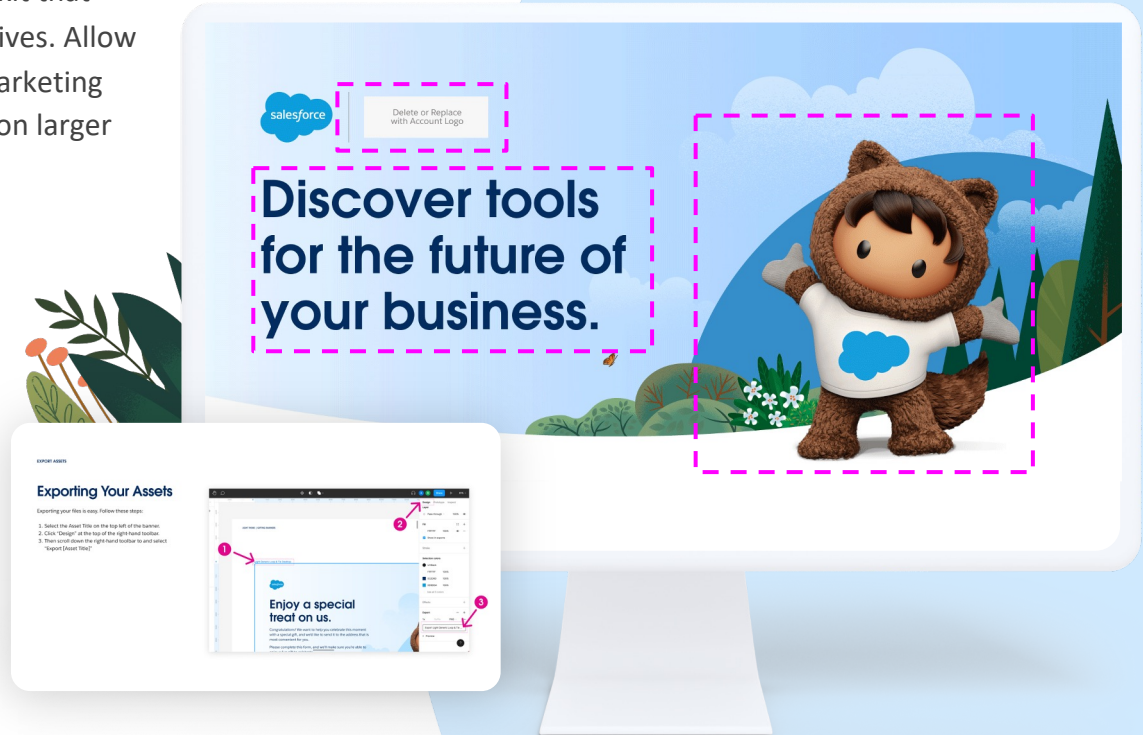
This advertisement features a cartoon bear character and a woman. The background is light blue with a gear icon.

Personalising Assets at Scale

Scalable ABM Marketing Asset Toolbox: Streamlined, Cohesive, Efficient

This is a scalable, grab-and-go marketing toolkit that ABMers can utilize for customer-facing initiatives. Allow ABMers to quickly curate cohesive-looking marketing campaigns – giving them more time to focus on larger scale demands.

Choose your own
journey



ABM Direct Mail & Moments that Matter

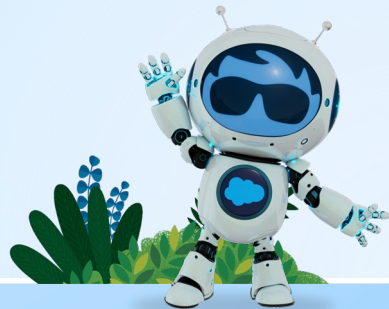
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What is it?

- Direct Mail is a great way to get in front of key stakeholders, offering an alternative to online marketing initiatives and often resulting in much higher response rates.
- SwagIQ is an automated tool inside CRM, allowing sales to send personalised mailers to prospects and customers.
- This tactic can be used to celebrate 'moments that matter', build awareness with new decision makers, schedule meetings and open new opportunities.

How sales action

Add a personalised message and automated via CR



Account-first Journey focused on Customer Priorities



Customer centric. Insight driven. Connected touchpoints reaching decision makers



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Driving Growth is hard when Marketing and Sales are not Aligned



Marketing Team

Legacy technology

Siloed data

Disconnected customer experiences

Difficulty sharing leads



Sales Team

Our Marketing Plan Is Tied to Sales Priorities



Sales Targets

\$xxM

Pipe Targets

\$xxM

ACV Target



Sales Leader Priorities

Pipeline to accelerate Growth & Land Top Accounts

3 X Pipe Gen activities & Scale Top Accounts and Big Deals

Expedite Growth in Industry & CMRCL

Leverage Industry Playbook & Accelerate High Velocity & commercial MM accounts

Trusted AI Advisors & Storytellers

Create Success stories in AI & Data, Agentforce pitched in every account

Specialisation & Sell the "C360 Cocktail"

Sell the C360 and multi-cloud deals

Customer Success & Time-to Value

Delivered w Partners, Services and Success; leverage ecosystem

Marketing Targets

\$xxM

MDP Target

\$xxM

MMA Target



Marketing Priorities

Pipe Generation (MDP)

Deliver on MDP \$ and Contribution target

Fuel New Logos

Leverage data to target prospects & new logos

Strategic Accounts

Ensure integrated Engagement of top accounts across Exec Engagement, SICs and ABM

Leverage Digital for Cost-Efficient Scaled Engagement

Increase use of virtual events & digital content/channels

Increase use of virtual events & digital content/channels

Position SF as AI Thought Leaders and highlight Agentforce stories



Sales & Marketing Dashboard

The dashboard shows the following:

Overview of Sales & marketing activity

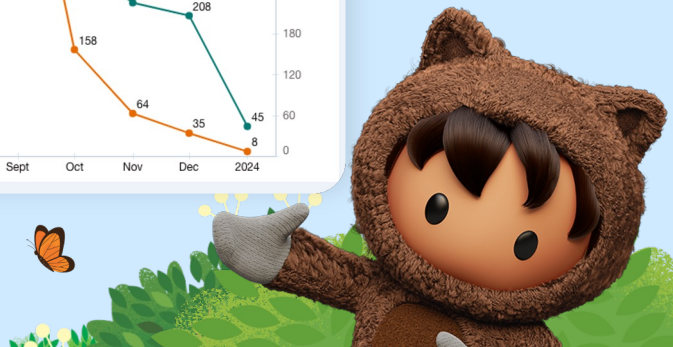
- **When are we engaging?**
- Campaign follow up
- Whom are we engaging with?
- Whom should I contact next?

Sales Activity

Overview of all sales touchpoints by day, week, month, qtr and year

Marketing Activity

Overview of all marketing outreach- spikes around strategic events - eg. London WT and Dreamforce in September



How AI Helps Personalise Sales Outreach



Prompt



Help me write a catchy email to advertise Dreamforce 2024 to this contact and encourage attendance. Offer reserved seats to returning customers.

NO Grounding

Dear Sam,

Dreamforce 2024 — the essential Salesforce event for Marketers — is just around the corner. Seats are going fast, but there's still time to register! If you've attended before, we've reserved you a ticket!

Grounded with CRM Data

Dear Sam,

I am thrilled to invite you back to Dreamforce 2024. Seats are going fast but, as a valued Marketing Cloud customer, we've saved 4 tickets for you and your colleagues!



Sam Smith
Company X

Marketing Cloud
Purchased Jan 2017

Last event attended
Dreamforce 2023

How Can a Marketer Use Analytics on Data Cloud

salesforce



Account Executive



I'm meeting a contact of my customer next week. **What should I know** about this contact and the account?



The screenshot displays the Salesforce internal interface. On the left is a navigation sidebar with a list of contacts including Jerome Coste, Jesse Luke, Johnson Ton, Kunal Pal, Lijie Fu, Matthew Leverone, Michael Andrew, Mike Lee, Nirupa Boricha, Patrick Loughran, Paul Rodibaugh, Praveen Khurana, Rahul Sharma, Samuel Rosen, Sanjna Parulekar, Saroj Motwani, Sharat Radhakrishnan, Sonia Lele, Srinivas Vemuru, Tarini Sundar, Trishya Varma, and William Young. The main content area shows a message from @emmajones with the following text:

Hi @emmajones

💡 Heard about the Salesforce Truth Profile that is hard at work to get you insights and signals that help you take your ninja sales game to the next level? Here are some insights that the Truth Profile thinks may help you!

The following contacts from Cross First Bank engaged with below Pages on Salesforce.com in the last 24 Hours

Tara Jones, Sales Manager visited:

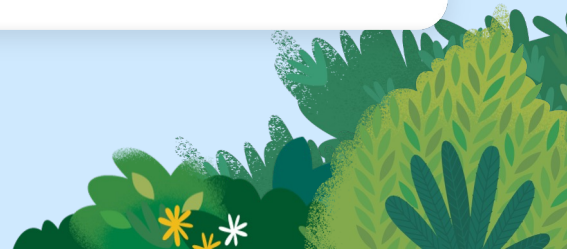
- Salesforce+ Episodes:
 - Think Outside the Quota: Community Grows Opportunity
 - Simply Put: Sales: Learn How Sales Reps Can Be More Efficient
- Pages related to:
 - Sales
 - Revenue Growth
 - Financial Services Cloud
 - Customer Retention
- Pricing Pages related to:
 - Sales Cloud
 - Financial Services Cloud

💡 Note from Truth Profile Customer Model : Our response scoring algorithm predicts that Tara Jones has a high probability of opportunity conversion based on the recency and of engagement, searches, profile data and other factors.

Please note that Cross First Bank has an open late stage opportunity in play.

👉👉👉 Recommended Actions:

- Use LinkedIn Sales Navigator to research this prospect
- Navigate to AE Home to see other Account Insights related to your accounts



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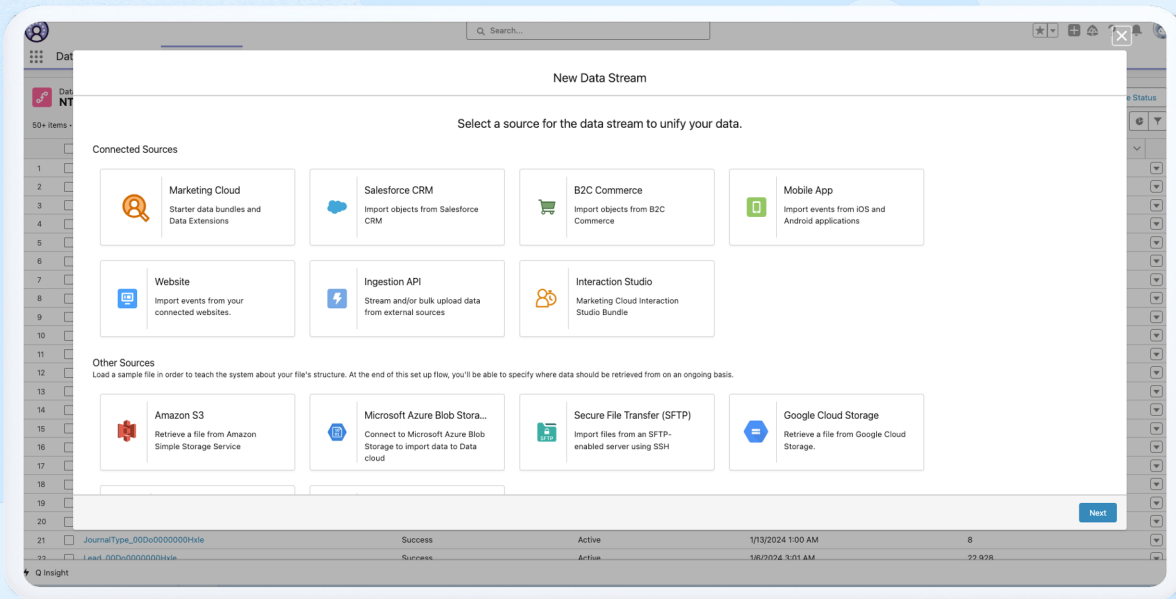








Activate data from any source



Unify data

Operational Customer Profile



-  **Anonymous**
-  **Identity**
-  **Historical**
-  **Real-time**
-  **Unstructured**
-  **Business**

Salesforce | External

Activate data from any source



Unify Data

Operational Customer Profile

northern trail outfitters

Search Salesforce

Data Cloud Home Data Streams Segments Activations Data Lake Objects Data Model Identity Resolutions Calculated Insights Rachel Morris

Rachel Morris
Indianapolis, Indiana

Customer ID: c514424b-376c-45f6-8...
Email Address: r.morris.52881@gmail.com
Phone Number: (317) 407-2755
Address: 20 N Meridian, Indianapolis, IN 46220

Segment: High Propensity to Buy

Lifetime Value: \$3,882.26 (Avg \$152.50)

Propensity to Purchase: Most Likely

Engagement Score: 84%
Highly Engaged
Compared to 12k similar audience

Powered By

Affinities Purchases Interaction

Activity

- Hiking
- Swimming
- Cycling
- Running

Climate

- Hot
- Very Hot
- Temperate
- Cold

Category

- Footwear
- Tops
- Tights
- Socks

Color

- Light/White
- Black
- Blue
- Multi

Channels Purchases Engagement Loyalty

- In-Store Purchases
- Website
- Email
- Mobile App

View All

Customer Activity Updated 01/15/2023 7:53 AM ET

- Order Placed** 5 days ago
Action that prompted: Clicked on "Purchase Hiking boots"
- Joined myNTO Rewards** 6 days ago
Action that prompted: Form Submission
- Interacted with Tiktok Ad** 6 days ago
Action that prompted:

Engagement Insights
Average Session Time



Rachel
Rachel@email.com

- Ad click
- Web visit
- Purchase
- Product view
- Conversations



Capturing Data to Build a True Customer Profile



Build it like a product

JAgile, Roadmaps, Releases, Adoption



Start small and focus on value

High value use cases with low barrier to start



Quality over quantity

Better data > more data

Data Sources



Salesforce CRM-Org62



Events



Trailhead



Event and Webinar Data



Non-Salesforce Data



Website Data



Paid Intelligence



Google Analytics



TBiD

Truth Profile SSOT Record

Profile

Name: Samantha Smith

TBID: 0058W000008nGcqQAE
samantha@trailblazer.me

Twitter: AwesomeAdminSamantha

Email: ssmith@gmail.com,
ssmith@nto.com (Marketing opt in)

Account: NTO

Title: CIO

Trailhead: Explorer

Engagement

Website: Visited Product pages: Marketing Cloud/CDP,
Watched the C360 webinar series

Events: Attended an MC event

Email: Opened an email with offer Journey builder



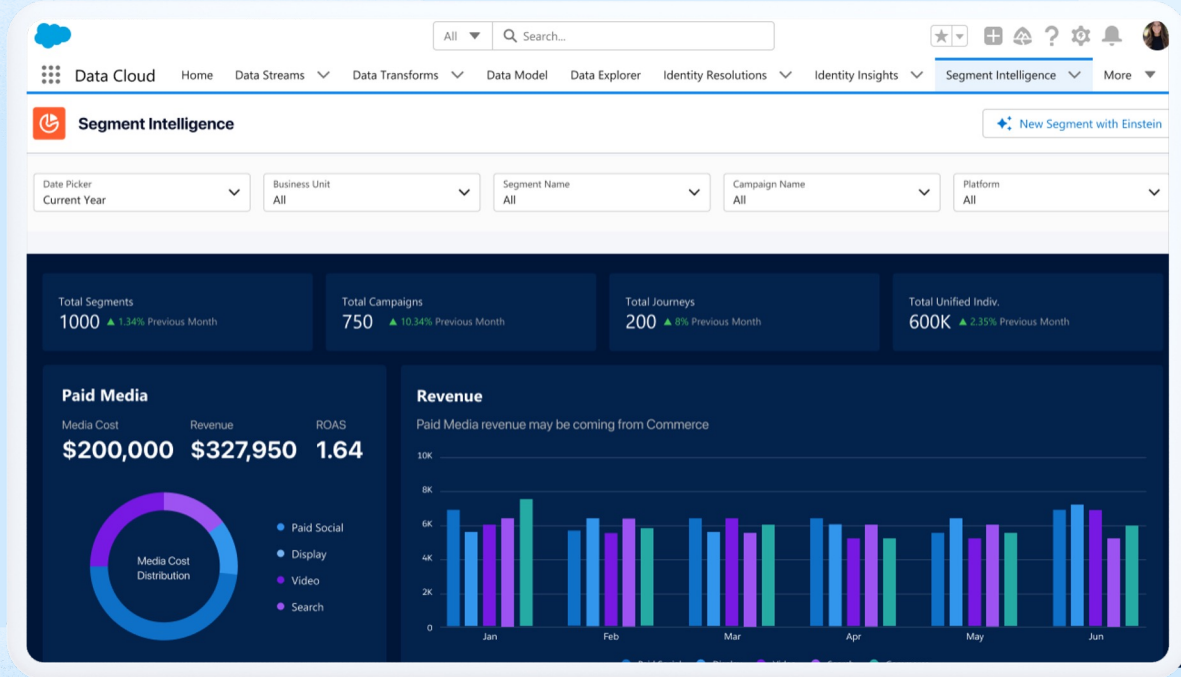
Deploy campaigns faster with trusted AI

After unifying your data the second step is an AI strategy

Gain insights

Plan campaigns

Generate content



- Visualizations
- Actionable Intelligence

Leverage out-of-the box dashboards that combine customer, revenue, and 3rd party data to understand and optimize segment performance across activations (e.g., Marketing Cloud journey, Google Ads campaign)



Deploy campaigns faster with trusted AI



Gain insights

Plan campaigns

Generate content

Segments
NTO Segments

8 Items - Sorted by Segment Name - Filtered by All segments

Segment Name
1 AbleU Enthusiast
2 Did not Engage with Email last 7 Days
3 Engaged with Email last 7 Days
4 Frequent In Store Guests
5 Lapsed High Value Customer
6 LM - NTO Rewards Close to Next Tier
7 Price Sensitive Audience
8 Referred by FB or Instagram

Create Segment with Einstein

Segment Preview
Review the segment and its attributes and make changes if needed. You can always edit your original prompt and then regenerate the preview.

Outdoor Enthusiasts(09) [Edit Segment Rules](#)

[Count Population](#)

Segment Description
Target audience interested in hiking gear, including bags, helmets, and pumps, with a specific interest in hiking and searching for hiking gear.

Unified Individual

Attributes	Possible Values
<input checked="" type="checkbox"/> Interest	Is Equal To Hiking

Product Browse Engagement

Attributes	Possible Values
<input checked="" type="checkbox"/> Product	Is In GEARBAGSLUGGAGE.GEARCYCLIN...
<input type="checkbox"/> Product Category	Is Equal To Category

[Previous](#) [Create Segment](#)

Einstein

This tool uses generative AI, which can produce inaccurate or harmful responses.

Describe the segment you're creating using simple phrases, and then press enter to preview the segment.

Don't enter personally identifiable data such as names, addresses, or numerical identifiers.

[Create a segment of "Create a segment of customers with an interest in hiking"](#)

The drafted segment "Outdoor Enthusiasts(09)" is ready. Review the segment's name, description and suggested attributes and make changes if needed.

[Refine Segment](#)



Brief & tactics



Audience segmentation



Customer journeys



Personalized recommendations



How Event team can use Data Cloud



Event Marketer



How many individuals have a high 'Product Interest Score' for marketing cloud and haven't attended an event **over the last 26 months?**



The screenshot displays the 'Truth Profile' for 'Genie Marketing Audiences' with the following metrics:

- Total Profiles: 177M
- Unique Profiles: 83M
- Total Accounts: 3.3M

Horizontal bar charts show the following breakdown:

- EmailProfile: 79.5M
- Org62 Contacts: 46.6M
- Org62 Leads: 39.9M
- TBID User: 7.7M
- Others: 2.6M
- SFPLU Subscriber: 0.4M

Key charts and data points include:

- Sales VP+:** 14.5% (highlighted in a callout box)
- All Else:** 85.5%
- Key Decision Makers with high for Top-4 Clouds:** 11.8% VP+, 88.2% All Else
- Commerce:** 6.5% VP+, 93.5% All Else

Additional sections include 'Contacts by Industry Distribution', 'Contacts by Job Level', and 'Contacts with High Product Interest Score'. A callout box at the bottom right states: "Active contacts are defined by their activity seen in the last 90 days on website and campaign responses".



How ABM can use Data Cloud



ABM
Marketer



How many contacts have a high 'Product Interest Score' for Sales Cloud and belong to / are a Business Decision Maker and their **organisation does not own Sales Cloud**



marketing decision science Truth Profile
Genie Marketing Audiences

177M Total Profiles 83M Unique Profiles

3.3M Total Accounts

Accounts with Single Cloud Product Entitlement
Top 4 Clouds Only

Category	Count
Sales	903
Service	200
Marketing	97
Commerce	15

Accounts by Industry
% of total accounts

Industry	% of total accounts
Professional Services	16.67%
High Tech	14.63%
Retail & CG	13.60%

Accounts with Single Cloud Product Entitlement
Top 4 Clouds Only

Category	Count
Sales	903
Service	200
Marketing	97
Commerce	15

Multi Cloud Accounts: 0.5K, 0.01% total

- Null ✓
- Adica Group ✓
- ANDias co., Ltd ✓
- Arquitecto Maggi Cercone ✓
- Atlanta Scitosis Center ✓
- ATMECS Technologies Pvt. ✓
- AXIA ✓
- Beauty Bela Cosme Corpo. ✓
- Bricklog Deutschland Gm. ✓
- BTX Chain Industries ✓
- BVEATS INC. ✓
- Choi hands Co.,Ltd. ✓
- Community Resource Cen. ✓
- Complex Biotech Discover... ✓
- Computer Support & Asso. ✓
- COOP SIRIFER CALABRIA ✓
- COSTRUZIONI AERONAUT. ✓
- DIRECT CAPITAL SOURCE ✓
- DQS Certification M Sdn. ✓
- Enterprise System Solut. ✓
- F.LU PALOMBA SRL ✓
- FactOne Capital ✓
- Fides Link Taipei ✓
- FINNEBUCK & P. A. ✓

Accounts by AOV Band
All bands, excld. \$0 account AOV

AOV Band	Count
\$1-\$5K	41,848
\$5K-\$10K	276
\$10K-\$20K	20
\$20K-\$50K	11,479
\$50K-\$100K	2
\$100K-\$200K	2,130
\$200K-\$500K	1,317
\$500K-\$1M	1,016
\$1M-\$1.5M	244

\$0 Account AOV: 98% Accounts, 3.21M of



Deploy campaigns faster with trusted AI



Gain insights

Plan campaigns

Generate content

The screenshot shows the Salesforce Content Builder interface for editing an email titled "Fall Promotion". The "Draft Copy" section is active, displaying three draft body copy options. Each option includes a radio button, a thumbs up/down icon, and a trash icon. The first draft is selected. Below the drafts are "Reset" and "Create" buttons. At the bottom of the interface, there are "Cancel" and "Add Body Copy" buttons. A disclaimer is visible at the bottom left of the draft area.

Content Builder | Feedback | Northern Trail Outfitters | Sri

Edit Email | Fall Promotion | Last saved on 9/14/2023 at 6:06 PM

Draft Copy

Entries
Enter a "key message" and other optional inputs to generate Body Copy.

* Key Message

Create a few different iterations on some body copy that could be used to illustrate the value of our loyalty program and joining offer

Brand Personality | View Brand Identity
Choose Personality
Adventurous

Sample Body Copy
Enter base Body Copy without AMPScript

* Disclaimer
This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein GPT are applied to your organization.
 Okay, got it

Draft Body Copy
Choose a body copy to add. To like or dislike a drafted body copy, use 👍 or 👎.

- Are you ready to step up your footwear game? We have fantastic news for you! For a limited time only, we're offering an incredible discount of 50% off on our entire range of stylish shoes. Yes, you read that right! It's the perfect opportunity to grab that pair you've had your eye on or explore new styles to elevate your fashion statement. Don't miss out on this exclusive deal! 👍 👎
- Elevate your footwear collection today! We're excited to share some fantastic news with you. For a limited time, enjoy an amazing 50% discount on our entire selection of stylish shoes. You heard it correctly! Whether you've been eyeing a specific pair or want to discover new trends, now's the ideal moment to make your move. Seize this exclusive deal before it slips away! 👍 👎
- Ready to upgrade your shoe game? We're thrilled to bring you some exciting news. Take advantage of a special limited-time offer: a remarkable 50% off on our entire range of chic shoes. Yes, you got that right! Whether you're set on a particular pair or eager to experiment with fresh styles, this is the perfect chance to shine in fashion. Don't let this exclusive deal pass you by! 👍 👎

Reset | Create

Cancel | Add Body Copy

high-quality materials to ensure durability and provide utmost comfort. | taste and occasion. Whether you're looking for chic heels. | unbeatable price. Here's how you can take advantage of this.



Images



Copy



Hyper-personalize across every touchpoint



Personalize moments

Optimize performance

The screenshot shows the Salesforce Journey Builder interface for a journey named "Outdoor Activity Targeting". The interface includes a top navigation bar with "Journey Builder", "Journeys", "Entry Sources", "History", and "Templates". Below this is a "Journeys Dashboard" header with "Outdoor Activity Targeting" and a "Version 2" dropdown. The main area displays a flowchart of the journey steps: Einstein STO, Interactive Email, Preferred Channel Split, Activity Email 1 (2 Days), Activity Email 2 (1 Day), Ad Campaign (1 Minute), Activity SMS 1 (2 Days), Activity SMS 2 (1 Minute), Activity Whatsapp 1 (2 Days), and Activity Whatsapp 2 (1 Minute). On the left, there is a "Data Extension" section with a table showing "COUNT" as 22,346. Below that is a "Schedule" section with options for "Start", "Repeat", and "End". On the right, there are two mobile device mockups: one showing a text message from "Northern Trail" about a rewards program, and another showing a mobile app notification for "Double Points for the Outdoors". At the bottom of the interface, there are five circular icons: a magnifying glass, a heart, a bar chart, a shopping cart, and a person icon.

Every Channel

- Email
- Ads
- Mobile
- Web
- Shopping channels
- Social platforms
- Loyalty programs
- Sales comms
- Service cases

Agenda

salesforce

1 **ABM at Salesforce and our Strategy**

2 **ABM Account Selection**

3 **ABM in action - Tools and Tactics**

4 **ABM Sales & Marketing Alignment**

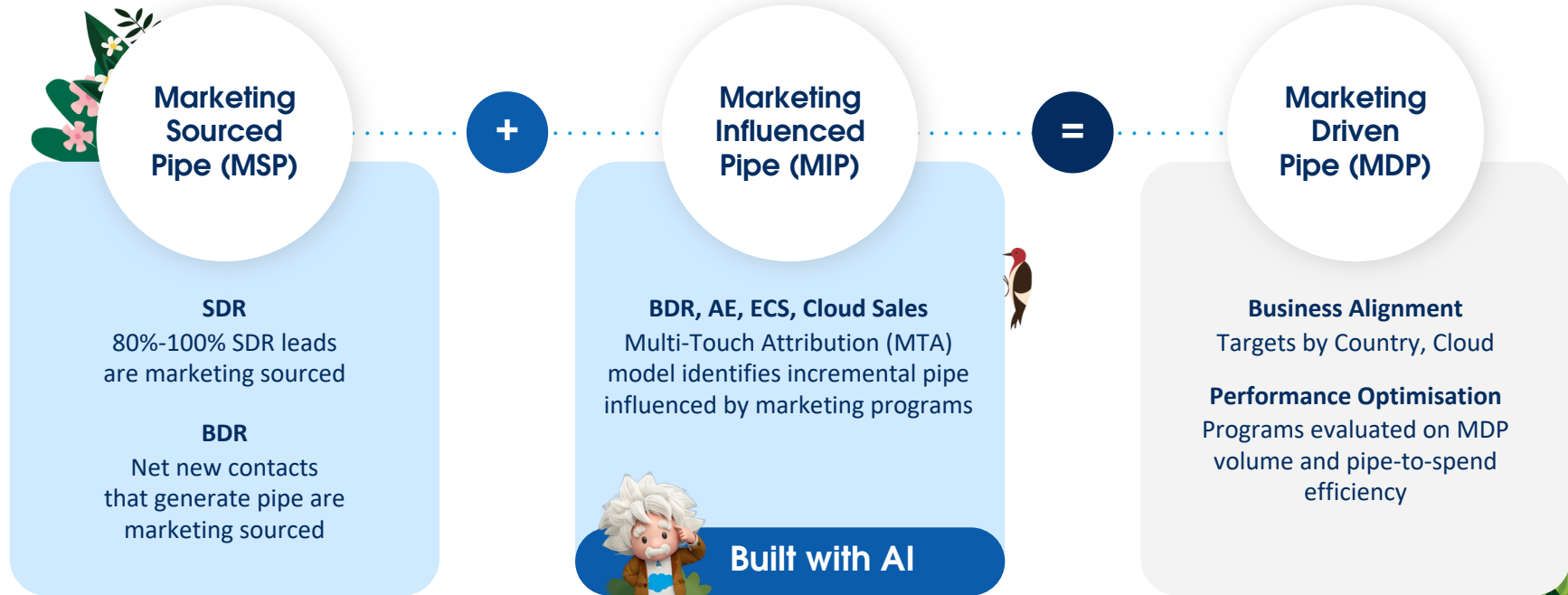
5 **ABM on Salesforce**

6 **ABM Data & Measurement**



New Marketing Pipe Generation Framework

To align marketing outputs with sales required inputs



Integrated ABM Success Metrics



Revenue	Relationships	Reputation
Marketing Pipegen	VP+/EDM Responses	Engagement Coverage
Marketing ACV	Executive Engagement, engagement: SIC, Exec Programs	# Marketing Responses & Sales Activity
Marketing Pipe Maturation	Salesforce Event Attendance	New Contacts Added VP+ / Exec Decision Makers (EDM)
Deal Velocity YoY	Trailhead Users & Engagement	Brand perception
Deal Size YoY # of Deals YoY	Sales Meetings Completed	Sales Feedback
Clouds per Oppty		Customer Advocates

RELATIONSHIP
Build Meaningful Relationships

REPUTATION
Generate Awareness & Interest

REVENUE
Grow Pipeline & ACV

R³



KEY KPIs for Success

Measuring Success across 1:1, 1:Few and 1:Many



1:1 Metrics

REPUTATION

- **Customer satisfaction:** CSAT Score (% increase/decrease)
- **Account team Satisfaction**-poll to AEs

RELATIONSHIP

Increase account engagement

- Increased account engagement on SF.com via intent monitoring
- Account Engagement on customer microsite

Identify and engage with Key Stakeholders

- % of execs who registered and/or attended events (strategic, exec, industry, SIC)

Identify and engage new executive stakeholders

- % of execs who registered and/or attended events (strategic, exec, industry, SIC)

Develop references, advocates & Trailblazers

- New advocate with existing customer accounts (case study, Trailhead etc)

REVENUE & ACCOUNT SPECIFIC

- Develop new opportunities within the account
- Cross-sell / Up-sell to drive to multi-cloud
- Three goals aligned to each account
- MDP Targets

1:Few Metrics

REPUTATION

- **Customer satisfaction:** CSAT Score (% increase/decrease)
- **Account team satisfaction**

RELATIONSHIP

Deepen Relationships for insights & Innovation

- % of execs who registered and/or attended an executive event
- % of accounts/contacts who have booked an SIC or meeting
- Number of content downloads with existing customer accounts (e.g. event, case study, dinners etc.)

Identify and engage new executive stakeholders

- % of execs who registered and/or attended events (strategic, exec, industry, SIC)

REVENUE

- MDP targets
- Promote Slack/Mulesoft /Tableau

1:Many Metrics

REPUTATION

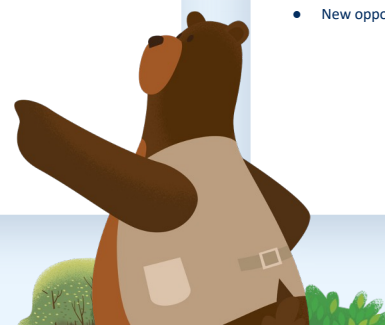
- **Engagement Score**
- **MQLs** (from 3rd party events or media)
- # Target Accounts attending strat events / 3rd party events
- **Third party event engagement**

RELATIONSHIP

- # of accounts tagged contacts who registered and/or attended an event
- # of tagged contacts who have booked an SIC or meeting
- # of new contacts engaged
- Number of content downloads by accounts tagged

REVENUE: MDP

- MDP targets
- #New logos generated
- Number of leads /opportunities created across defined accounts
- New opportunities created



ABM Integrated Campaign Flow

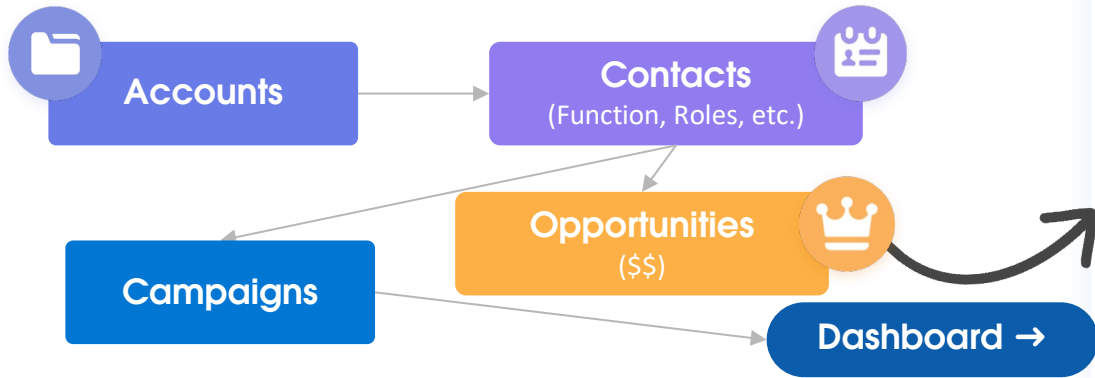


All accounts in the program are Tagged

Key Decision makers and Influential C-Suite Tagged

Account: Amazon AWS APN (AWS)
Core Edition: Unlimited edition
Rating: Tier 1
Locked Rating: Tier 1
Professional Services Rating: Tier 2 - High potential for significant AOV long term
Marketing Cloud Rating: Tier 1
Marketing Priority Score: #FY23_DREAM,#FY23ABM_AMER_Tab1:#FY23_NetZeroCIoud,#FY23ABM_AMER_1:#FY23ABM_GSCP

Contact: Ruba Borno
Executive Decision Maker
Job Function: Alliances
Job Level: VP Level
Description
Contact Purchased From
Marketing Program: ABM_BDM



Global ABM Dashboard

Executive Overview | Baseline Comparison | Revenue | Pipe | Reputation | Relations

Year-Quarter: FY2022 Q4 | Program Region: All ABM | Sales Program: All | Level 3 Leader: All | Country: All

SFDC Revenue Metrics		SFDC Pipe Metrics	
\$413.5M SFDC ACV (\$)	\$81.9k Avg Deal Size (\$) by Opty	\$555.8k Avg Deal Size (\$) by Combo Co	\$781.3M SFDC Pipegen (\$)
37.8% \$ ACV YY	37.6% Deal Size by Opty YY		16.2% \$ Pipegen YY
29% Avg Close Rate	81 Velocity: Avg Sales Cycle		\$0 SFDC Open Pipe (\$)
2.7% Close Rate YY	39.3% Sales Cycle YY		- \$ Open Pipe YY
Marketing Revenue Metrics		Marketing Pipe Metric	
\$348.7M Marketing ACV (\$)	\$224.1M Marketing Mat ACV (\$)	\$399.6M Marketing Pipegen	
66.1% \$ MA YY	84.3% MA Contribution	66% \$ MMA YY	71.4% \$ MP YY
			51.1% MP Contribution



Marketing Performance dashboard

Business Case: Ability to view MDP, MIP & MSP by team/ function

Ability to see:



Trends over quarters



Key metrics: MDP, MSP, MIP, YOY, % Contribution, engagement: responses by tactic, ETOP (Event Touched Open Pipe)



Best/ top performing campaigns
Industry Breakdown



What is driving MSP
Deal Support MMA



What's working/ not working and tweak



New Logo Flag Filter available

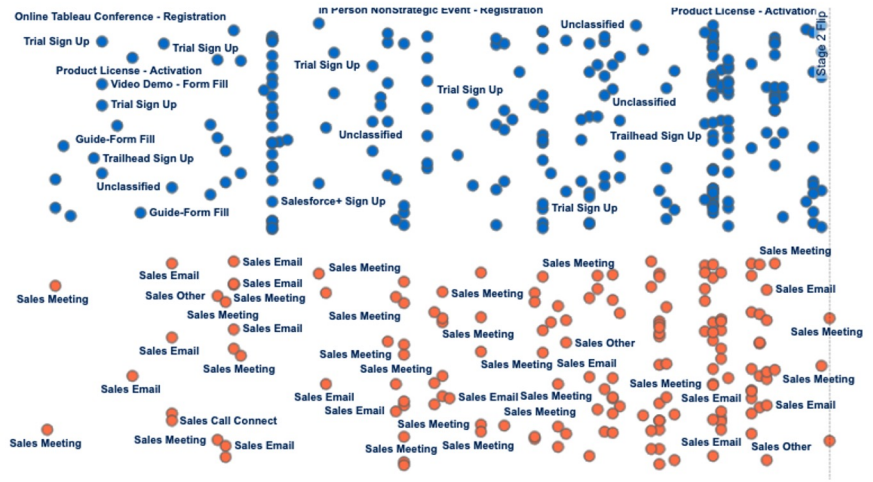


AI Driven Multi-touch attribution Dashboard



Touchpoint Confluence

Touchpoints by Day



Cumulative Number of Touchpoints Over Time

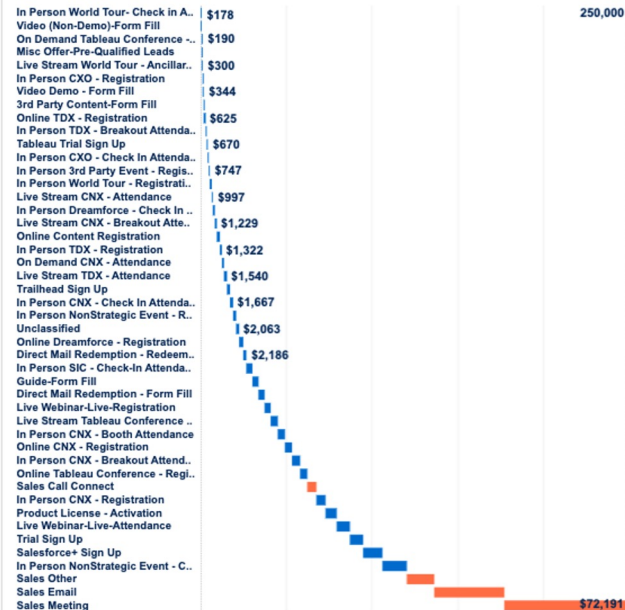


Opportunity Amount \$ Attribution by Touchpoint

Legend for All Visualizations ■ Marketing ■ Sales

Touchpoint Level Metric

Click a Touchpoint to filter daily touchpoint visualizations



Contacts

Click on a contact to filter visualizations above

Contact Id	Contact Detail	Total Touchpoints	Sales Touchpoints	Marketing Touchpoints	Opportunity Amt \$
Grand Total		392	158	234	\$250,000
Null	First Name Unknown Last Initial Unknown-Title Unknown	1	1	0	\$13,926



Top Account engagement dashboard

Business Case: Ability to view contact touches by team/ function for each account

Ability to see:



Total responses QoQ YoY
Unique contacts /new contacts



Key responses by tactic for each account and
for top 100 accounts



Unique contacts by account and engagement
at SIC or events



New / unique responses by industry / cloud /
sales leader level



New Logo Flag Filter available for responses

Navigation: < Jader L5 (right form... | By Sales Leader L5 | By Sales Leader L6 | By Sales Leader L7 | By Tactic | By Tactic L4 | By Tactic L5 | Digital Only By Offer Type | Only VP+ Contacts | By Job >

By Tactic

	UKI Levers	Lvl 3 User Nm / First Response Fin Fiscal Qtr Nm				Grand Total
		Zahra Bahrololoumi				
		Q1	Q2	Q3	Q4	
FY24 - Total Responses		1,817	29,273	8,028	1,002	40,120
	Strategic Events	3,897	6,166	5,182	7,016	22,261
	GTM Events & Other	2,733	4,150	4,809	4,882	16,574
	Paid Digital	8,012	9,227	11,722	6,897	35,858
	Organic Digital	309	1,207	535	556	2,607
	Executive Engagement	293	1,551	1,176	2,609	5,629
	ABM	805	1,101	950	725	3,581
	SIC	13	3	2	5	23
	Sales Dev					
YOY - Total Responses		22%	76%	-16%	-81%	22%
	Strategic Events	82%	16%	88%	103%	63%
	GTM Events & Other	21%	42%	9%	143%	43%
	Paid Digital	17%	30%	48%	16%	29%
	Organic Digital	179%	152%	120%	53%	133%
	Executive Engagement	2154%	337%	-10%	349%	150%
	ABM	340%	810%	242%	305%	371%
	SIC	-88%	-95%	-96%	-78%	-90%
	Sales Dev					
FY24 - Unique Contacts		958	8,492	2,365	591	10,551
	Strategic Events	3,413	5,608	4,360	3,844	15,161
	GTM Events & Other	2,586	3,784	3,991	4,556	13,622
	Paid Digital	5,211	6,086	7,452	4,548	19,928
	Organic Digital	258	877	418	411	1,6
	Executive Engagement	283	1,230	869	2,008	
	ABM	787	981	808	700	
	SIC	6	3	2	5	
	Sales Dev					
YOY - Unique Contacts		0%	43%	0%	0%	

Quarter (First Response ...)

- (All)
- Q1
- Q2
- Q3
- Q4

Lvl 5 User Nm

- (All)
- Alice Steels
- Anna Bratton
- EMEA - UKI - IE - AVP
- MS - EMEA - UKI - S...
- Navkinder Sanghera

Lvl 6 User Nm

- (All)



3 key takeaways



Data Strategy Guide

How to transform
Information into Innovation

[Read Here](#)



AI Strategy Guide

How to create a game changing
AI Strategy

[Read Here](#)



The State of Data & Analytics report

[Read Here](#)

Thank You



Dashboards To Provide Data Driven Marketing Decisions



Website Performance

Paid Digital Performance

Leads Performance

Marketing Performance



Product Workshop Kit

Data Cloud Version

What is it?

A kit to rally people around Data Cloud, ideal for a workshop.

What's in it?

- Tablecloth (8ft table)
- One or two Pull-up banner(s)
- Table tent with Data Cloud QR Code
- Each attendee will receive:
 - 4x6" notebook
 - Pen
 - Stickers (3)
 - Write-in name tag
- Optional *Unlock the Box Game*
 - Acrylic Box with Lock and keys
 - Astro Plushie (1)
 - Gifting sign (1)

Ideal event size?

15 to 50 people

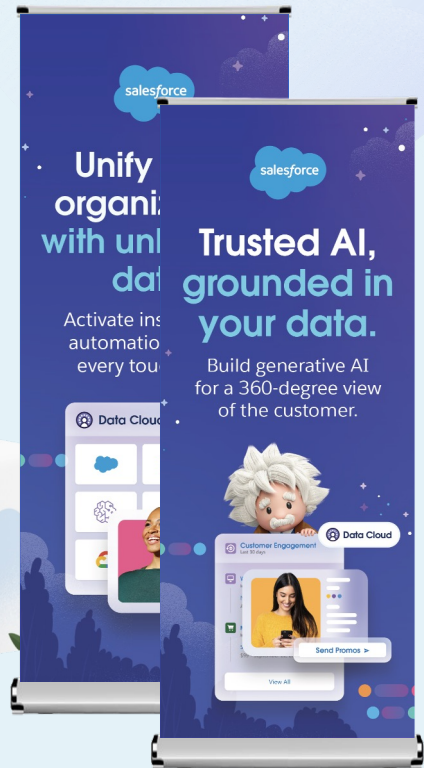
Also available in Agentforce



Option to add another banner



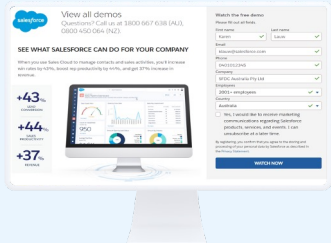
Interactive Add-On



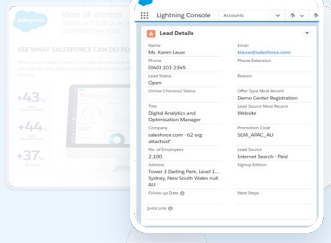
Lead Flow Process and Tracking: Handing Over to Sales



Engage on website



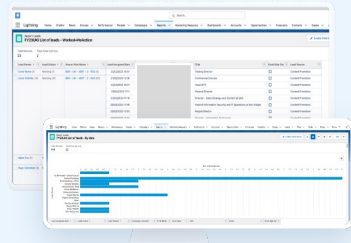
Unknown profile



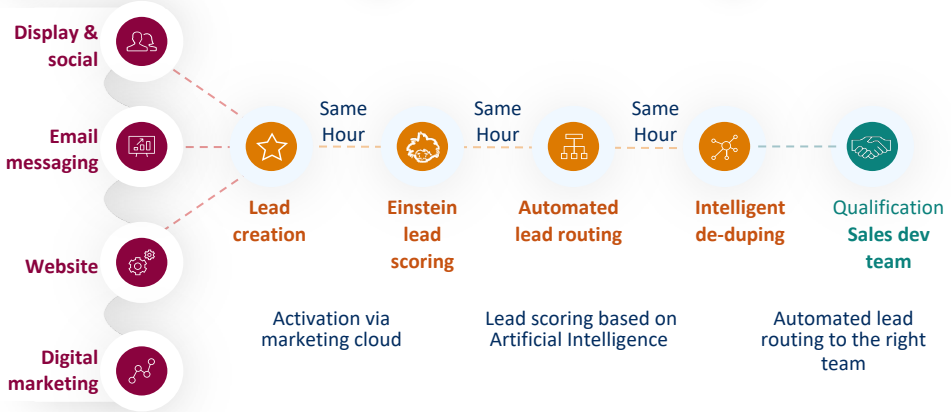
Known profile



Known profile



Lead dashboard Tracking & follow up



Calling a lead back in <30 mins give you a 25% higher chance of flipping it than if the call back was >60 min

Thank You

