



Sukces w Retail

Data + AI + CRM + Trust

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Salesforce
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Salesforce



Forward Looking Statements



salesforce

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. 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Salesforce is working hard to come up with new ideas, even though there are lots of things making it tricky for them. They're trying their best.

We are in the AI Revolution



Wave 1

Predictive

How to |

- How to increase conversions
- How to optimize spend
- How to personalize experiences
- How to grow relationships



Wave 2

Generative



Wave 3

Autonomous
& Agents



Wave 4

Artificial
General
Intelligence



17%

of holiday
sales
influenced
by AI

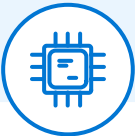
Key Tactics to Build an AI Strategy Now



Focus on
customer
experience



Make data
the bedrock
for AI



Embed AI
in the flow
of work



Keep humans
in the loop



Prioritize
practical use
cases

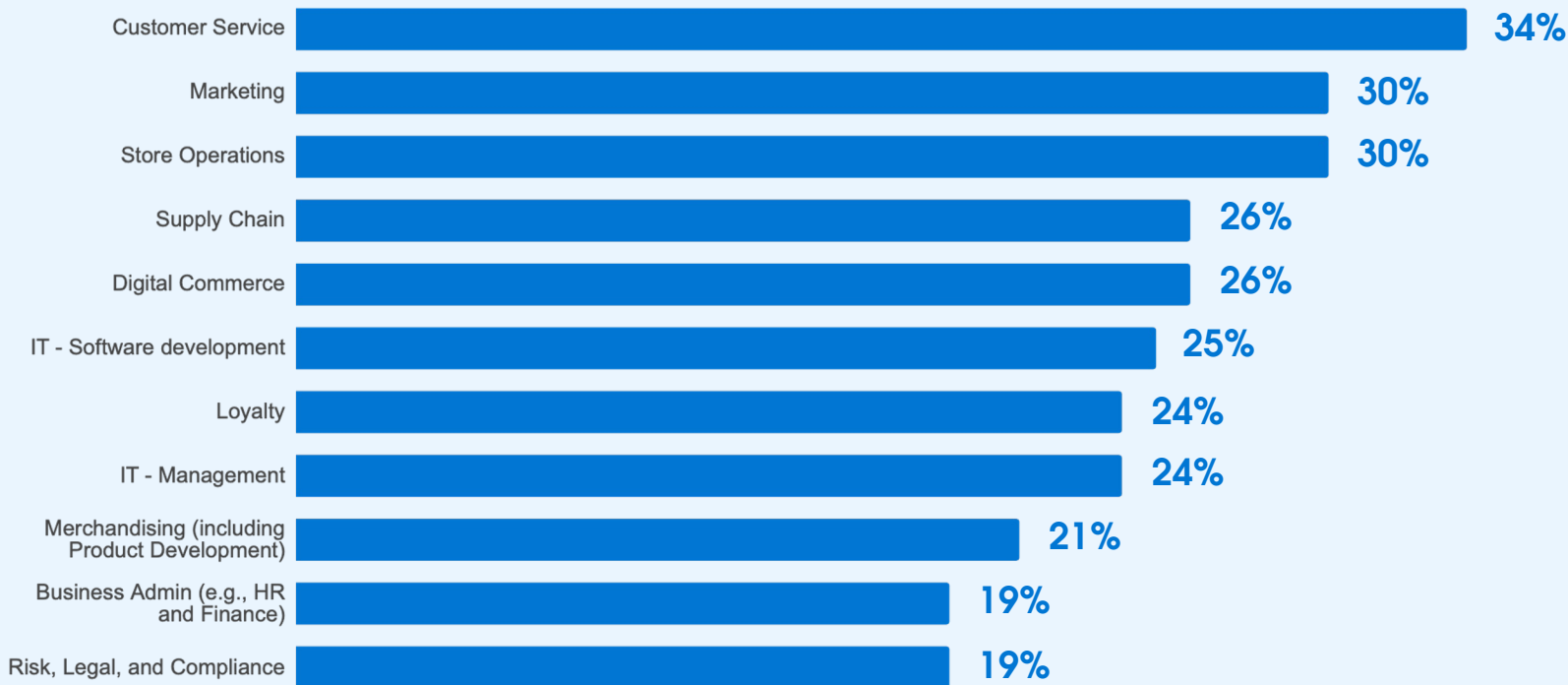
Trust + Security



Retailers Focus on Customer Experience with Generative AI



Top Functions for Generative AI Application in Retail



Data is Core to Generative AI



Data is trapped in
















44

consumer engagement systems, on average, across the enterprise.

Given this challenge, among others,

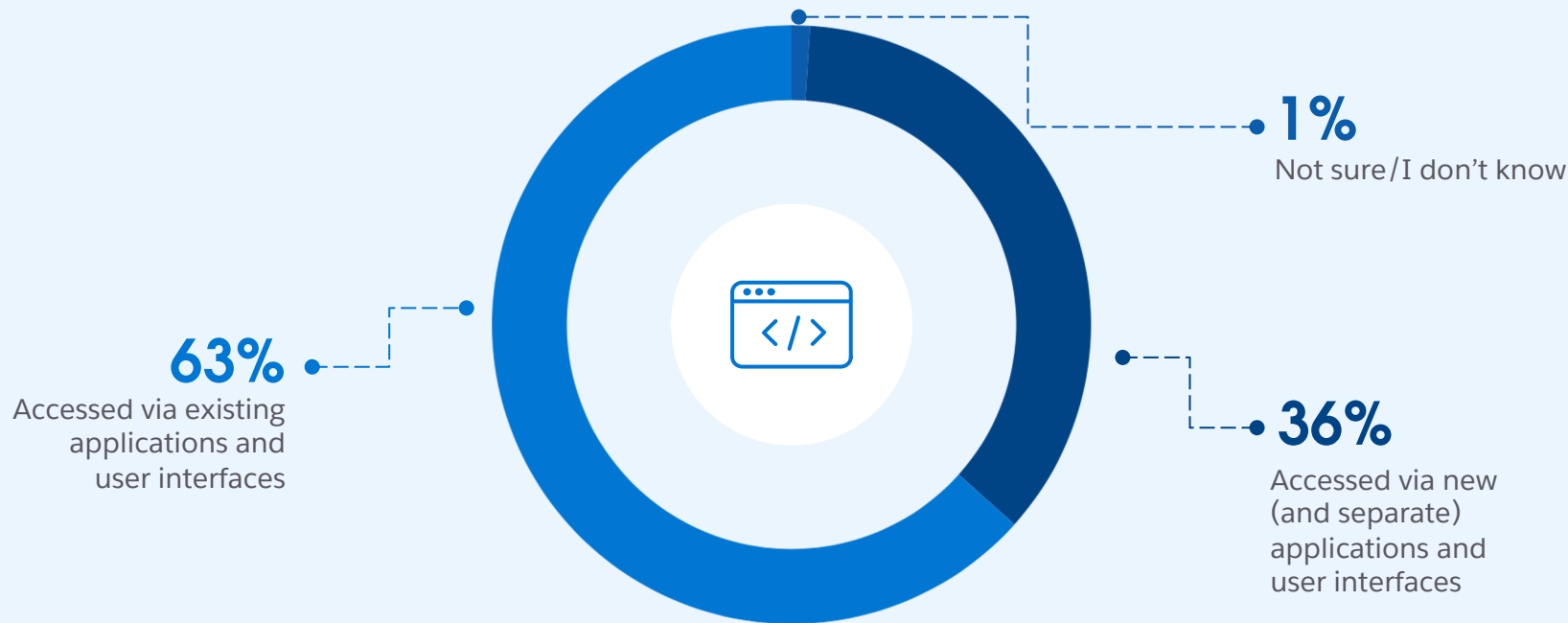
54%

of retailers are not fully able to use its data to most effectively leverage Generative AI

Examples of Consumer Data Collected By Retailers	Examples of Data Collected By Retailers
 Shopping history (e.g., purchases, frequency)	 Price and promotion data
 Loyalty data (e.g., points, tiers, offers)	 Consumer data
 Behavior (e.g., browsing, intent, price sensitivity)	 Order data
 Profile (e.g., birthday, gender)	 Loyalty program data
 Marketing (e.g., location, device, email advertising response)	 Product data
 Preference (e.g., brand, color)	 Inventory data
 Social (e.g., posts, likes)	 Benchmarks and other industry data
 Account and service (e.g., cases, chats)	

Gen AI Embedded Into Existing Applications

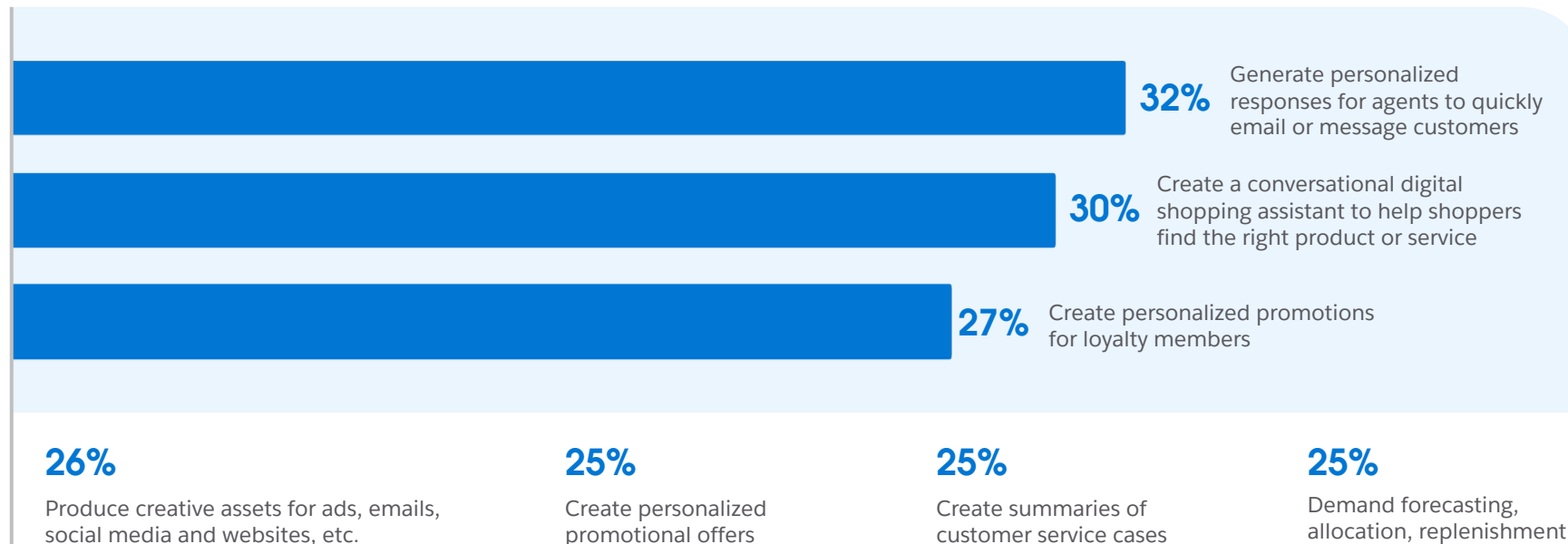
How Employees and Customers Expect to Access Generative AI in the Retail Industry



Top Use Cases: Increasing Personalization and Removing Friction

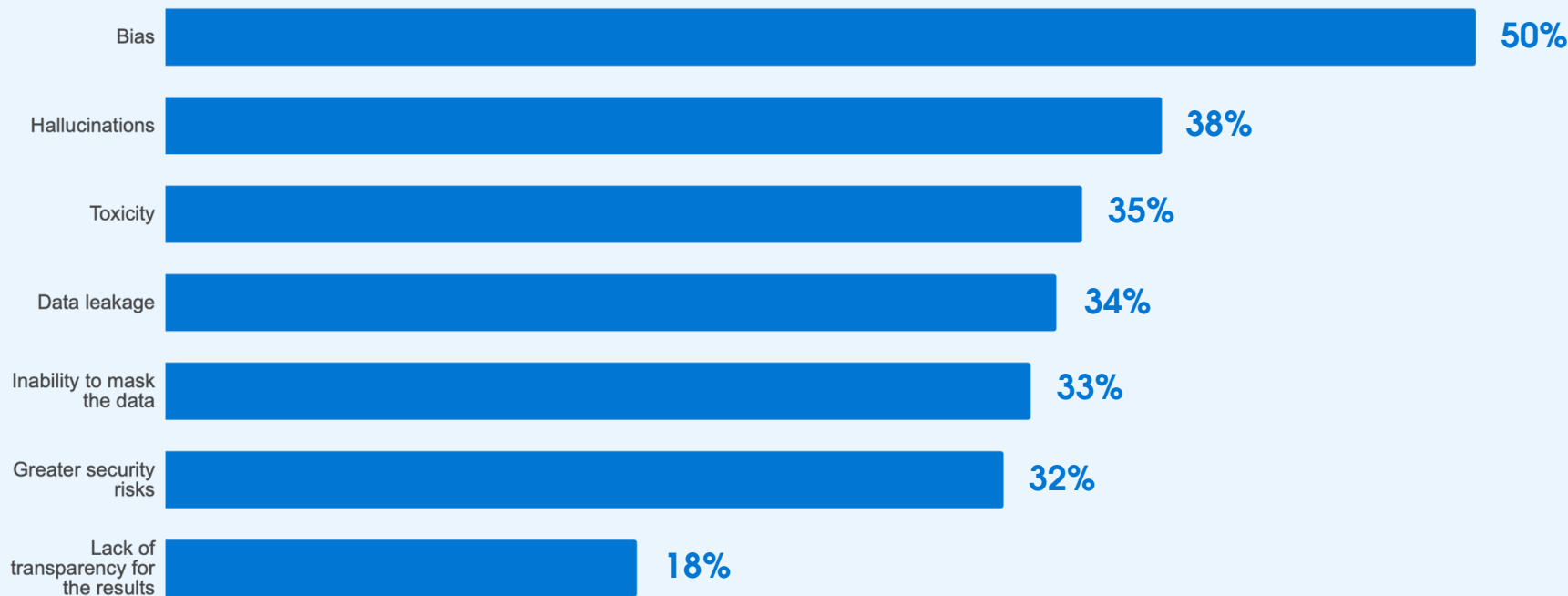


Top Generative AI Practical Use Cases in Retail



Biggest Risks in Gen AI

Ranking of Generative AI's Perceived Risks



Uchwyć Moment AI



Data



AI



CRM



Trust





**Każda firma potrzebuje
Strategii AI**

AI jest tylko tak dobre
jak Twoje Dane



Twoja Strategia AI jest tylko tak dobra jak Twoja Strategia Danych

Marzenia
AI

Ugruntowana AI

Spersonalizowane
interakcje

Szybka innowacja

Wyzwania
integracyjne

Rzeczywistość
danych

76%

firm z trudem
wdraża AI
skutecznie

Ograniczenia
danych i
jakość

Szybko
zmieniający
się krajobraz
technologiczny



Ale połączenie wszystkich Twoich danych nie jest łatwe

Web and Mobile

ML Platforms

ERP

Point of Sale

Order Management

Advertising

Data Lakes & Warehouses

Financial Management

Analytics

Human Resources

Średnia firma
posiada

1,026

różnych
aplikacji



Ale połączenie wszystkich danych o kliencie nie jest łatwe



Service Cases
Case 12345

Service Profiles
00800 753 3333
Samantha Smith

Samantha Smith
s.smith.58221@gmail.com

Different phone numbers

Desk Data
SKU 8wr7013

~75%
No Name

Marketing Profiles
sam@mystyle.com

s.smith.58221@gmail.com

**Email/SMS/Push
Engagement**

Duplicates
Unintentional

**Web and Mobile
Engagement**

Guest Checkout
Samantha Smith,
sam@mystyle.com,
+44 800-753-2333

Commerce Profile
Sam Smith
s.smith.58221@gmail.com
(0) 800-753-2333

~78%
Guest Orders

Airport Data
SKU 9134abc

Multiple Emails

**Known &
Unknown Data**

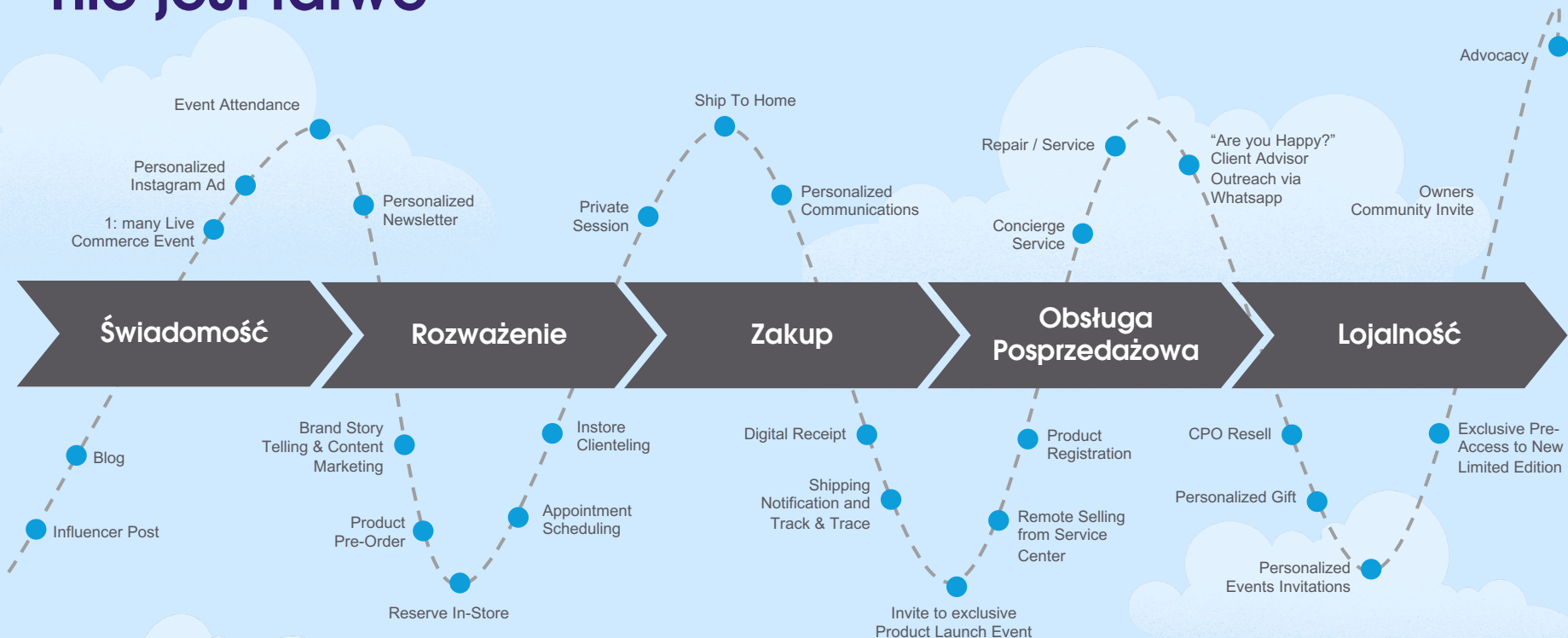
Community Profile
StylishSam

Legacy Loyalty Data
Gold member

Social Handle
Only

BI Tools/Data Science
High LTV

Ale połączenie danych na każdym etapie ścieżki nie jest łatwe



Wszystko zaczyna się od danych



Data Sources

Ingestion Methods

Data Flow

Data Harmonization & Identity Resolution

Salesforce

Cloud Based

3rd Party Data

3rd Party Partners

S3 Redshift Big Query Snowflake

Native Connectors or

AppExchange

Data Sharing

ZERO COPY

Data Ingestion

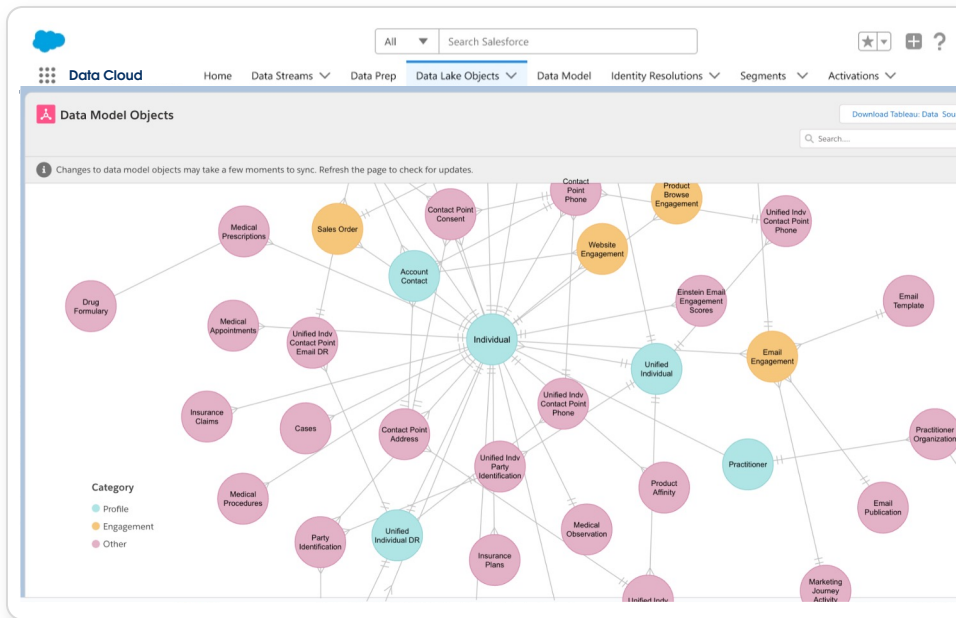


Scheduled



Stream

Data Sharing



Data Lake Object

Data Model Objects

DATA FOUNDATION & ARTIFICIAL INTELLIGENCE

Integration
Integrate data from internal and external systems

Unify Profiles
Unify known profiles

Insights & Analytics
Understanding consumers & purchase behaviour

Segmentation
Advertising Suppression
Targeted Campaigns
Lookalike Segments
AI-driven Segmentation

Augmentation
Calculated Insights
Predictive Scoring
CLTV Modeling

Zero Data Copy
Zero ETL Sharing



Targeted Advertising

Nurture & Onboard

Omni-Channel Commerce

Post-Purchase Experience

Gamified Loyalty

Świadomość

- Einstein Lookalike Audiences
- Referral Mkt. Prediction
- Segment Creation

Rozważenie

- Engage Content Creation
- Campaign Assistant*
- Tableau Pulse
- MC Segment Intelligence
- Typeface Partnership
- Brand Identity Center
- Send Time Optimization
- Activity & Frequency Scoring
- MC Einstein Insights (Copy, Messaging, Mktg.)
- MC Copilot*

Zakup

- Commerce Concierge
- Return Analysis
- Generative Page Des
- Commerce Intelligence
- Commerce Copilot

Obsługa

- Automated Service Replies
- Service Conversation Summary
- GPT Service Search (FAQs, Customer data)
- FAQ recommendations
- Service Bots
- Knowledge Creation
- SC Copilot

Lojalność

- Automated Service Replies
- Service Engagement Summary
- Promotion Copilot
- Dyn. Promo Content
- Fraud Detection



Ready Models, Build your model or Bring Your LLM



OpenAI



Anthropic



Cohere



Amazon Bedrock



Google Vertex AI



Databricks



DATA FOUNDATION & ARTIFICIAL INTELLIGENCE



Integration
Integrate data from internal and external systems



Unify Profiles
Unify known profiles



Insights & Analytics
Understanding consumers & purchase behaviour



Segmentation
Advertising Suppression
Targeted Campaigns
Lookalike Segments
AI-driven Segmentation

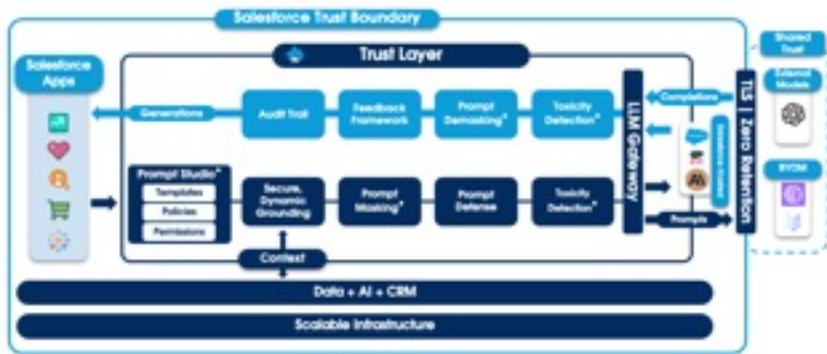


Augmentation
Calculated Insights
Predictive Scoring
CLTV Modeling



Zero Data Copy
Zero ETL Sharing





🔒 TRUST LAYER

🤖 Ready Models, Build your model or Bring Your LLM

OpenAI

AI
Anthropic

Cohere

aws
Amazon Bedrock

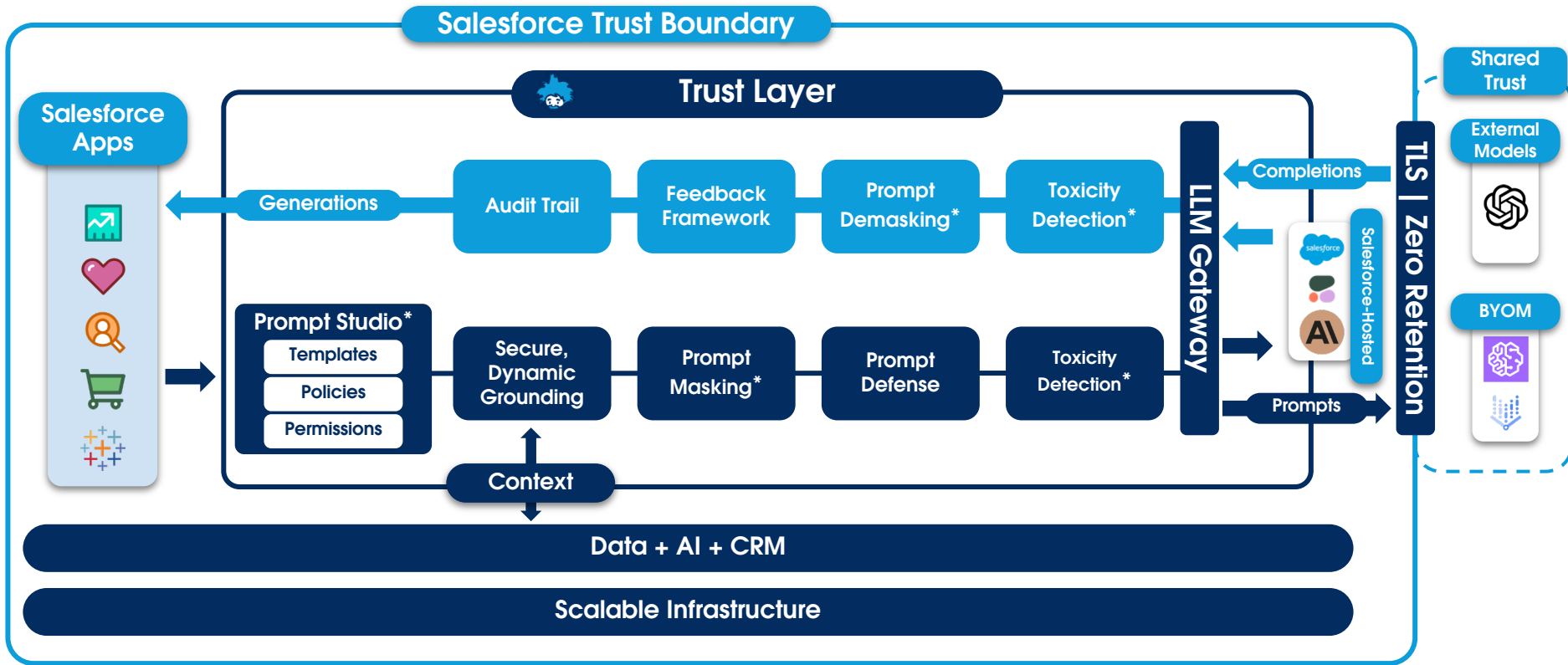
Google Vertex AI

Databricks

🔗 DATA FOUNDATION & ARTIFICIAL INTELLIGENCE

- Integration**
Integrate data from internal and external systems
- Unify Profiles**
Unify known profiles
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Understanding consumers & purchase behaviour
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Calculated Insights
Predictive Scoring
CLTV Modeling
- Zero Data Copy**
Zero ETL Sharing





Data Management Policies

Retain only the data you need at the org level. Obfuscate retained data for an extra layer of privacy.

[Go to Data Management Policies](#)

Right to Be Forgotten Policies

Honor customer requests by deleting or masking their data in specific records.

[Go to RTBF Policies](#)

Scheduled Jobs

View and manage the status of jobs scheduled to run for Data Management and Right to Be Forgotten policies.

[Go to Scheduled Jobs](#)

Right to Be Forgotten Requests

View, manage, and schedule requests from your customers who want you to delete their data.

[Go to RTBF Requests](#)

Portability Policies

Compile and deliver personal data to customers who make data subject access requests.

[Go to the DSAR Policy Manager in Setup](#)

Portability Log

View the status and result of jobs ran in response to data subject access requests. Access and send the generated files to your customers.

[Go to the DSAR Policy Log in Setup](#)

AUTOMATED

Preference Manager

Create, manage, and publish self-service forms for your customers to share their communication preferences.

[Go to Preference Manager](#)

Resources and Helpful Links

Check out these resources for help with Privacy Center:

- [European Union Privacy Law Basics](#)
- [California Consumer Privacy Act Basics](#)
- [US Privacy Law Basics](#)
- [Configuring your privacy policies](#)
- [Privacy Center & Consent Management Objects White Paper](#)



northerntrail CRM Dashboard for Andrew (Andy) Wong (San Francisco, CA)

Customer Metrics:
 Customer Value: \$18.5K | Average Spend: \$125.83 | Propensity to Churn: 12%

Recommendations:
 - Men's Chilkat Nylon Boots (Size: 11.5)
 - Wool Hike Light Crew (Size: Medium)
 - Men's Anorak (Size: Medium)

Engagement Feed:
 - Added to Campaign: Outdoor Enthusiast Hiking Gear Promo (10:45 AM | Dec 30)
 - Engagement Score Increase: Increased from 79% to 85% (5:25PM | Dec 25)
 - Added to Segment: Active Outdoor Shoppers (9:15AM | Dec 22)
 - Case Created: Lost Item - Men's north Dome Pullover Hoodie (3:14 PM | Dec 13)

Recent Purchases:
 - Men's Short-sleeve Heritage Tri-blend Tee (\$25.00 - Size: Medium - NTO-0126)
 - Gore Cloutfit Soft Shell Gloves (\$55.00 - Size: Medium - NTO-4271)

Automated Case Summaries

8:06 | Search Amazon

Sports Research Collagen Powder...
Sold by Sports Research

Issue: 1 | Details: 2 | Answer: 3

← Sports Research Collagen Powder Supplement ...

Tell us what happened with this

- Says delivered, but it's not here >
- Damaged or defective item >
- Return or replacement >
- Track shipping >
- Arrived too late >
- Found better price >

AI Service Replies

The reservations are already linked to your My Disney Experience account.

I am adding a request that you would like to stay in the same room for the split stay. One moment, please.

7 Min Ago

Perfect! Thank you!

Read 7 Min Ago

You're welcome!

This request has been added. While it will not appear in your My Disney Experience app, it has been shared with the resort.

As a reminder, the request is based on availability and is not guaranteed.

Now

Ok great, thank you!

Read Now

You're welcome! If you have any other questions, please feel free to message back and we will be happy to assist. Have a Magical day!

Now

TRUST LAYER

- Data Masking
- Toxicity Detection
- Zero Retention
- Audits
- Privacy Center

Ready Models, Build your model or Bring Your LLM



DATA FOUNDATION & ARTIFICIAL INTELLIGENCE

- Integration
- Unify Profiles
- Insights & Analytics
- Segmentation
- Augmentation
- Zero Data Copy

Cloud icon | All | Search Salesforce | [User Icons]

Salesforce Genie | Home | Data Streams | Data Prep | Data Lake Objects | Identity Resolutions | Custom Propensity Scoring | Segments | Alicia Stevenson

Alicia Stevenson
Phoenix, AZ

Customer ID: 09883454

Email Address: alicia95@gmail.com

Loyalty Status: Silver

Propensity to Purchase: Most Likely


Segments: Download Fitness Tracker App

Lifetime Value: \$2,565.26 (Avg. 1,852)

Engagement Score: 76% Engaged (Compared to 12K similar audience)

Next Best Action [See All]

Product Recommendation: WOMEN'S AMPEZZO RUNNING SHOES



The Ampezzo unique cushioning technology gives your feet and joints advanced comfort for top performance on your runs and walks. Even on the most demanding trails, the Ampezzo provided best-in-class traction...

Size: 7 | Price: \$120.00

Not Helpful | Take Action

Customer Activity | Insights | Cases | Details

Activity by Channel (Last 12 months)

Legend: Purchases (Green), Engagement (Blue), Outreach (Purple)

NTO Website

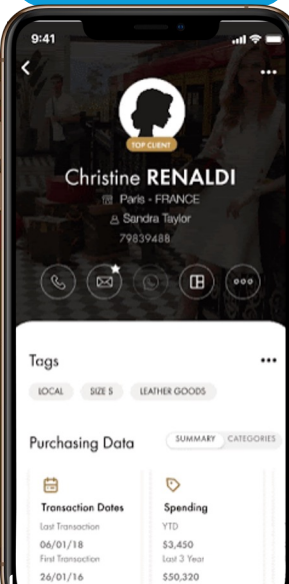
Email

Mobile NTO App

Engagement Feed

- Added to Segment 'Download Fitness Tracker App' (3 hour ago)
- Engagement Score Increase (Increase from 63% to 76% (3 hour ago))
- Life Time Value Increase (\$2,466.36 to \$2,565.26 (4 hour ago))
- Loyalty Account Created (3 hours ago)
- NTO Website Purchase (Subtotal: \$98.90 (1 day ago))
- Community Website Visit (Women Shoes (2 days ago))
- Mobile App Visit (Womens Footwear - Hikinn)

Clienteling



9:41

Christine RENALDI

Paris - FRANCE

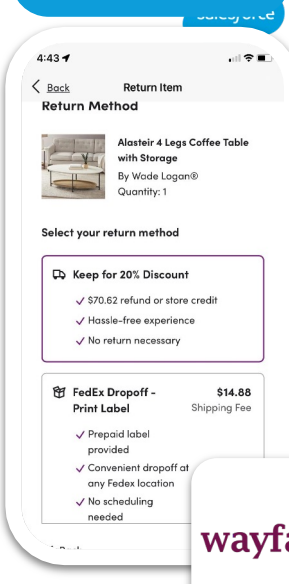
Sandra Taylor 79839488

Tags: LOCAL, SIZE 5, LEATHER GOODS

Purchasing Data

Transaction Dates	Spending YTD
Last Transaction: 06/01/18	\$3,450
First Transaction: 26/01/16	Just 3 Year: \$50,320

Self-Service



4:43

Return Item

Return Method

Alasteir 4 Legs Coffee Table with Storage

By Wade Logan®

Quantity: 1

Select your return method

Keep for 20% Discount

- ✓ \$70.62 refund or store credit
- ✓ Hassle-free experience
- ✓ No return necessary

FedEx Dropoff - Print Label \$14.88 Shipping Fee

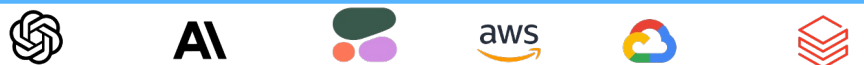
- ✓ Prepaid label provided
- ✓ Convenient dropoff at any FedEx location
- ✓ No scheduling needed



TRUST LAYER

- Data Masking
- Toxicity Detection
- Zero Retention
- Audits
- Privacy Center

Ready Models, Build your model or Bring Your LLM



DATA FOUNDATION & ARTIFICIAL INTELLIGENCE

- Integration
- Unify Profiles
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- Zero Data Copy

Customer ID 09883454
Email Address alicia95@gmail.com
Loyalty Status Silver

Activity Affinity Hiking

Propensity to Purchase: Most Likely

Segments: High Propensity to Buy Running Shoes

Lifetime Value \$2,565.26 (Avg. 1,852)

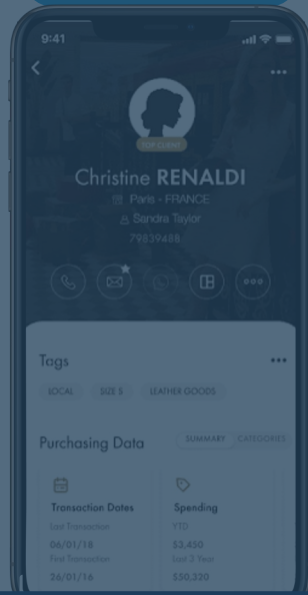
Engagement Score 76% Engaged Compared to 12K similar audience



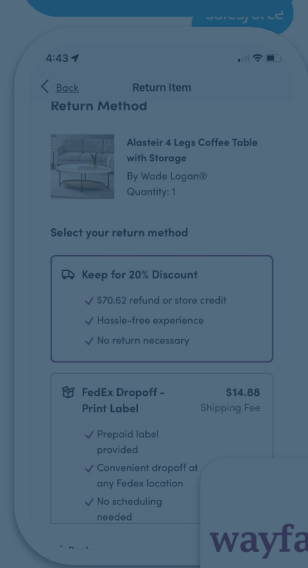
Engagement Feed

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- Community Website Visit Womens Shoes 2 days ago
- Mobile App Visit Womens Footwear • Hiking

Clienteling



Self-Service



TRUST LAYER

Identity Detection Zero Retention Audits Privacy Center

Recommendation Models, Build your model or Bring Your LLM



DATA FOUNDATION & ARTIFICIAL INTELLIGENCE



Targeted Advertising

Nurture & Onboard

Omni-Channel Commerce

Post-Purchase & Service Experience

Gamified Loyalty

Świadomość

Rozważenie

Zakup

Obsługa

Lojalność

- Marketing Cloud (Ad Studio)
- Data Cloud (Einstein Lookalike Segments, Activation in Advertising)
- Marketing Intelligence (Campaign Insights & Performance)
- Loyalty Management (Referral Marketing)

- Marketing Cloud (Engagement, Personalization)
- Data Cloud (Campaign Performance, Unification, Harmonization)

- Data Cloud (Real Time Insights)
- ISVs (Bambuser, Threekit, Proximity, Bayretail)
- B2C Commerce Cloud (Order Management, B2C Commerce Cloud)
- Marketing Cloud (Personalization)
- Slack (Store Operation)

- Service Cloud UE+ (Dig. Engagement, Bots)
- Experience Cloud (Self-Service Portal)
- ISVs Bringg & parcelLab (Returns & Exchange Portal)
- Marketing Cloud (Engagement, Personalization)

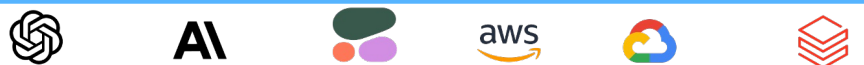
- Loyalty Management (LM, Global Promotions, Gamification)
- CRM Analytics (Customer Insights)
- Data Cloud (Segmentation, Lookalike Segments)
- Marketing Cloud (Engagement, Personalization)

CRM APPS

TRUST LAYER

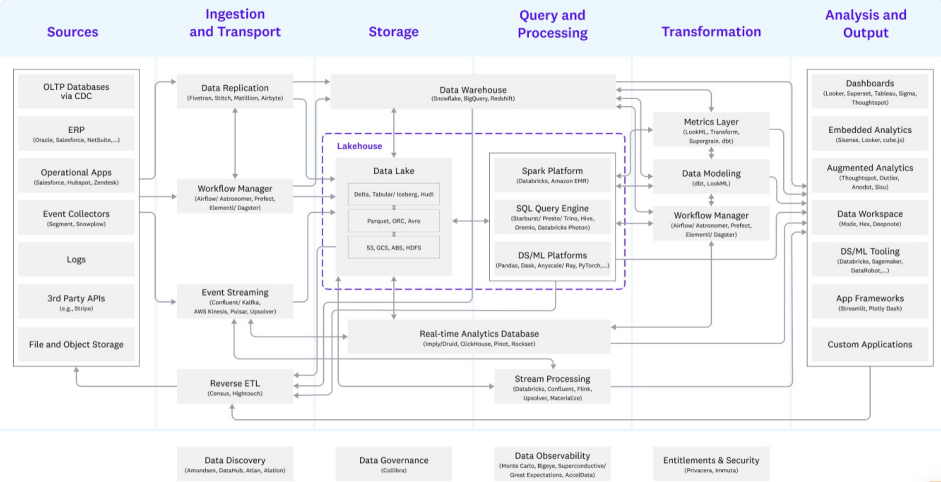
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Ready Models, Build your model or Bring Your LLM

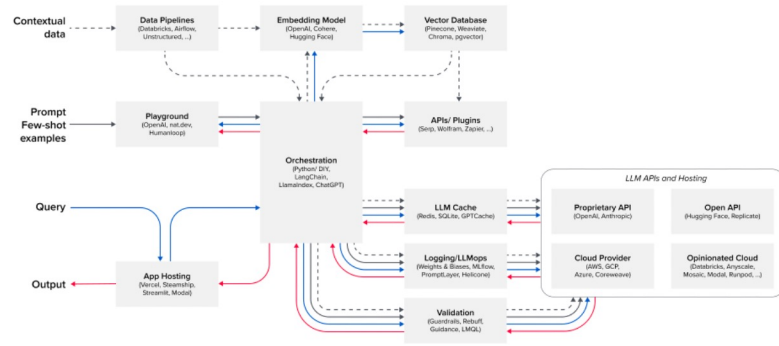


DATA FOUNDATION & ARTIFICIAL INTELLIGENCE

- Integration
- Unify Profiles
- Insights & Analytics
- Segmentation
- Augmentation
- Zero Data Copy



Emerging LLM App Stack



...and multiple data patterns require different technology.

<p>Real-Time Decisioning</p> <ul style="list-style-type: none"> Real-time Eventing Real-time IR Real-time Segments Real-time Actions 	<p>Machine-Learning Processing</p> <ul style="list-style-type: none"> Data Snapshots Feature Store/ Insights Batch/Stream Transformations SQL/File Access 	<p>Applications</p> <ul style="list-style-type: none"> Profiles, Engagement Data SQL, SOQL REST APIs Metadata
<p>Event Processing</p> <ul style="list-style-type: none"> Streaming Ingest Streaming Transforms Window Aggregates (last 5 min purchase etc.) Streaming Actions - Pub-Sub 	<p>Analytics</p> <ul style="list-style-type: none"> Batch Ingest Batch Transforms Batch Insights Columnar Stores SQL 	<p>Lakehouse</p> <ul style="list-style-type: none"> Delta Change capture Large Scale File Formats

Commonality - Data, Metadata, Insights

<p>Data Pipelines</p> <ul style="list-style-type: none"> Databricks Airflow Unstructured 	<p>Embedding Model</p> <ul style="list-style-type: none"> Open AI Cohere Hugging Face 	<p>Vector Database</p> <ul style="list-style-type: none"> Pinecone Weaviate ChromaDB
<p>Playground</p> <ul style="list-style-type: none"> OpenAI nat.dev Humanloop 	<p>Orchestration</p> <ul style="list-style-type: none"> LangChain LlamaIndex ChatGPT 	<p>API Plugins</p> <ul style="list-style-type: none"> Redis SQLite GPTCache
<p>LLM Cache</p> <ul style="list-style-type: none"> Redis SQLite GPTCache 	<p>Logging</p> <ul style="list-style-type: none"> MLflow PromptLayer Helicone 	<p>Validation</p> <ul style="list-style-type: none"> Guardrails Rebuff LMQL
<p>App Hosting</p> <ul style="list-style-type: none"> Vercel Steamship StremLit 	<p>LLM APIs</p> <ul style="list-style-type: none"> OpenAi Anthropic PaLM2 	<p>Cloud Providers</p> <ul style="list-style-type: none"> AWS GCP Azure



Predictive AI Use Cases

Your Business Teams



Service



Marketing



Sales



Commerce



IT

Predictive AI

Resolve inquiries more accurately

Customer Churn Prediction

Ticket Routing Models

Next Best Offer

Contextual Engagement

Create more resonant content

Customer Lifetime Value

Campaign Response

Personalized Email

Marketing Experimentation

Close deals faster

Lead Scoring

Sales Forecasting

Increase conversion rates

Demand Forecasting

Price Optimization

Product Recommendation

Develop faster

Code Completion

Natural Language to Code

Chat-based Coding Assistant

Code Analyzer IDE Integration

Your Data and AI Models

Your AI Models, Your ML Frameworks, Your ML Platforms, Your Infrastructure

Data Platform

Harmonized Profiles

Streaming Connectors

Lakehouse

Materialized Views

Zero-ETL Sharing

Generative AI Built on top of your data across your business



Your Business Teams



Service



Marketing



Sales



Commerce



IT

Generative AI

Resolve inquiries more accurately

Service Responses

Knowledge Creation

Work Summaries

Search Answers

Create more resonant content

Subject Lines

Campaign Assistance

Segment Creation

Marketing Experimentation

Close deals faster

Sales Emails
(Page Context)

Sales Emails
(CRM data + Email History)

Increase conversion rates

Product Descriptions

Smart Promotions

Commerce Concierge

Develop faster

Code Completion

Natural Language to Code

Chat-based Coding Assistant

Code Analyzer IDE Integration

Your AI Models, Your ML Frameworks, Your ML Platforms, Your Infrastructure

Data Platform

Harmonized Profiles

Streaming Connectors

Lakehouse

Materialized Views

Zero-ETL Sharing

Your Data and AI Models



Dziękuję!

