

# W poszukiwaniu świętego graala - unikalny profil klienta i jak go monetyzować?

Piotr Lempkowski, Salesforce





**Dziękuję!**





# Kto z Was słyszał o Unikalnym Profilu Klienta (aka Złoty Rekord)?



**Kto z Was pracuje/pracował w firmie, która zbudowała taki Unikalny Profil Klienta?**





**Profil klienta to kompleksowy podgląd na klienta firmy/marki.**

**Opiera się on na danych demograficznych, zachowaniach zakupowych, interakcjach, a także pragnieniach, potrzebach i preferencjach.**



**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

Objects Solutions Custom Propensity Scoring Segments Alicia Stevenson

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 Womens Shoes 2 days ago
- Mobile App Visit Womens Footwear

# The Holy Grail: Unified Customer Profile

All of Customer's important metrics are here.

Ex. Alicia has shopped with NTO through multiple retailers and platforms. Thank to Unified Customer Profile we know that she is a **loyal Silver Status customer**.

All of Alicia's email clicks, purchases, and service cases are brought in to single system where it can be aggregated and be powered by AI-models.

Through the Unified Customer Profile, we learn of her:

- **High lifetime Value of \$2500**
- **High Engagement Score of 76% and**
- **High Propensity to Buy Running Shoes**



**Sarah Franklin**

San Francisco, CA

- Customer ID **10426824**
- Email Address **sarah@gmail.com**
- Phone Number **(415) 772-0753**
- Address **415 Mission Street**  
San Francisco, CA 94105

Team Affinity **MCLAREN**

Lifetime Value **\$7,409.26**

Propensity to Purchase **Most Likely**

Engagement Score **93%**

★ **F1 VIP**

Powered by



## F1 Fan Engagement



### Channel Engagement

Customer Segments

F1 TV Watch History

#### Activity by Channel

F1 Website

Email

Mobile F1 App

Apr May Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar

### Activity Feed

- Mobile App View** Just now  
Action that prompted:  
Las Vegas Grand Prix
- Paddock Club** 30 mins ago  
Action that prompted:  
Purchased Tickets: Las Vegas Grand Prix
- F1 Website Visit** 3 hours ago  
Action that prompted:  
Viewed Page: Las Vegas Grand Prix
- F1 TV Pro** 1 day ago  
Action that prompted:  
Watched: 2022 Best Dramatic Moments
- Email Open** 1 day ago  
Action that prompted:  
Don't miss out: 2023 Selling Out
- Mobile App View** 3 days ago  
Action that prompted:  
Viewed Page: 2023 Race Schedule

[View All](#)



Piotr Lempkowski

Warszawa, PL

Customer ID 02567418

Email Address plempkowski@salesforce.com

Phone Number +48 600 000 000

Address Marszałkowska 1/12, 04-285 Warszawa, Polska

Segment High Propensity to Buy

Lifetime Value 2 607,49

Propensity to Purchase Likely

Engagement Score 84%



Affinities Purchases Interaction

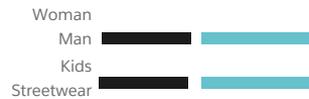
Type



Promotions



Category



Color



View All

Engagement Insights

Average Session Time

Channels

Purchases Engagement Outreach

In-Store Purchases

Website

Email

Mobile App



View All

Customer Activity

Updated Nov 5, 2023



Return

10 minutes ago

F Brand - CHINOSY SLIM FIT Z WEŁNĄ
Kod produktu: 0000SP3596
Value: 399,99 zł



Advertising audience - suppression

4 days ago



Online purchase

5 days ago

V Brand - GOLF Z WEŁNY MERINO
Kod produktu: 0000XA3834
Value: 349,99 zł

The screenshot displays the Salesforce CRM interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and utility icons. Below this is a secondary navigation bar with tabs for Sales, Home, Accounts, Contacts (selected), Leads, Opportunities, Reports, and Dashboards. The main content area shows the profile of a contact named Troy Smith, who is followed. The profile includes fields for Account Name (Allied Technologies), Title (Accountant), Phone ((726) 555-5626), and Email (Troy.Smith@alliedtech.com). Below the profile, there are two panels: 'Details' and 'Activity'. The 'Details' panel shows a list of related Opportunities, with one opportunity highlighted: 'Allied Technologies - Add-On Business - 18K'. This opportunity has an amount of \$44,016.67, is in the 'Discovery' stage, and has a close date of 01/12/2023. The 'Activity' panel shows a section for 'Upcoming & Overdue' with no activities to show, and a section for 'May 2023' with three mass email activities: 'Mass Email: Denver SMB Growth', 'Mass Email: Eval?', and 'Mass Email: Webinar Invite', each with a task assigned to Anna Wolak.

**Contact**  
Troy Smith

Account Name: Allied Technologies  
Title: Accountant  
Phone: (726) 555-5626  
Email: Troy.Smith@alliedtech.com

**Details** | Related

**Opportunities (1)**

[Allied Technologies - Add-On Business - 18K](#)

Amount: \$44,016.67  
Stage: Discovery  
Close Date: 01/12/2023

[View All](#)

**Activity** | Chatter | Quip

**Upcoming & Overdue**

No activities to show.  
Get started by sending an email, scheduling a task, and more.

**May 2023**

- Mass Email: Denver SMB Growth  
Anna Wolak had a task
- Mass Email: Eval?  
Anna Wolak had a task
- Mass Email: Webinar Invite  
Anna Wolak had a task

# Sales

The screenshot shows the Salesforce Service console interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and utility icons. Below this is a sub-navigation bar with 'Service' selected, and tabs for 'Home', 'Troy Smith | con...', 'Cases', and 'Contacts'. The main content area is divided into several sections:

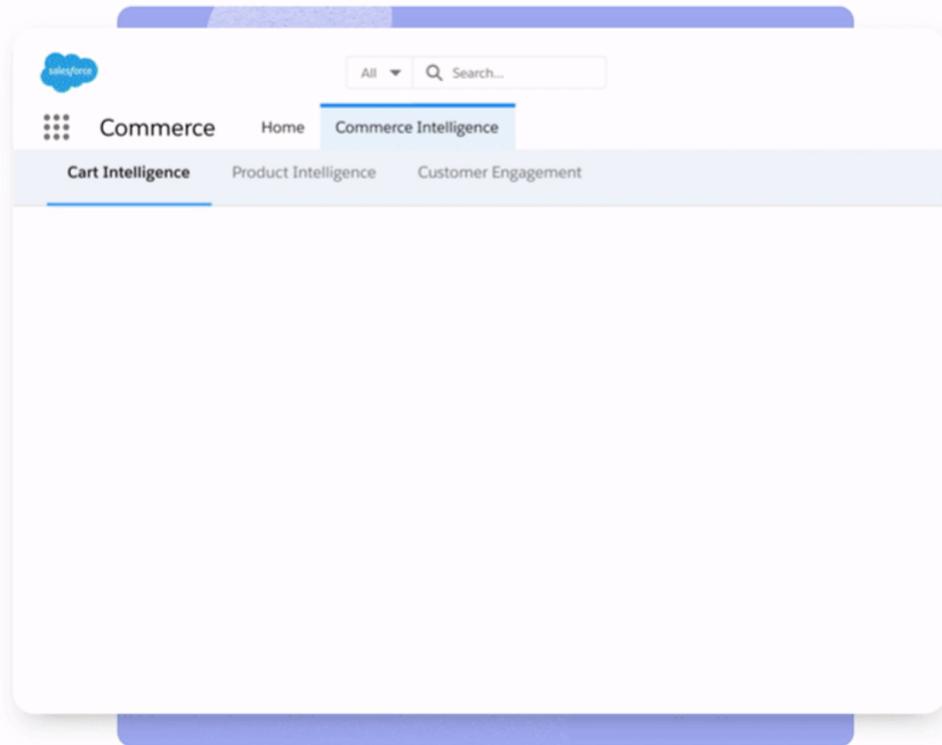
- Contact Header:** Displays the contact name 'Troy Smith' with a 'Following' status and buttons for 'Edit', 'New Case', and 'New Note'.
- Contact Details:** A table showing account information:

Account Name	Title	Phone	Email
<a href="#">Allied Technologies</a>	Accountant	(726) 555-5626	<a href="mailto:Troy.Smith@alliedtech.com">Troy.Smith@alliedtech.com</a>
- Related Cases (4):** A list of related cases with details for two items:

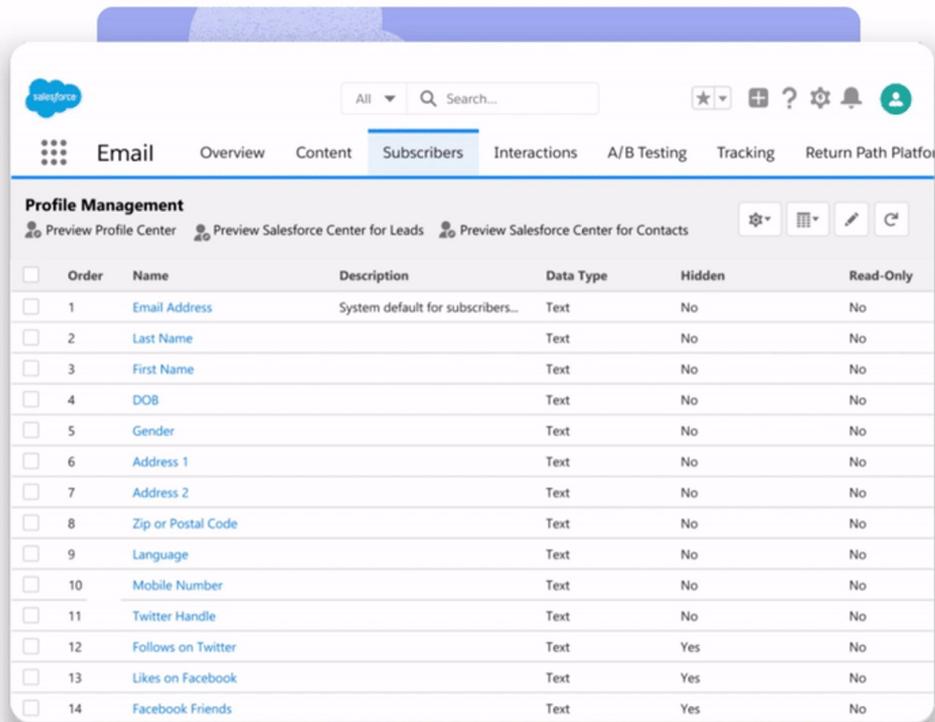
Case ID	Subject	Priority	Date
<a href="#">00001009</a>	Fitness Tracker Issue	Medium	03/1/2024
<a href="#">00001005</a>	Request Return by Mail	Medium	06/29/2023
- Activity Chatter:** A section for activity and chatter, currently empty.

A 'View All' link is located at the bottom of the Related Cases section.

# Service



# Commerce

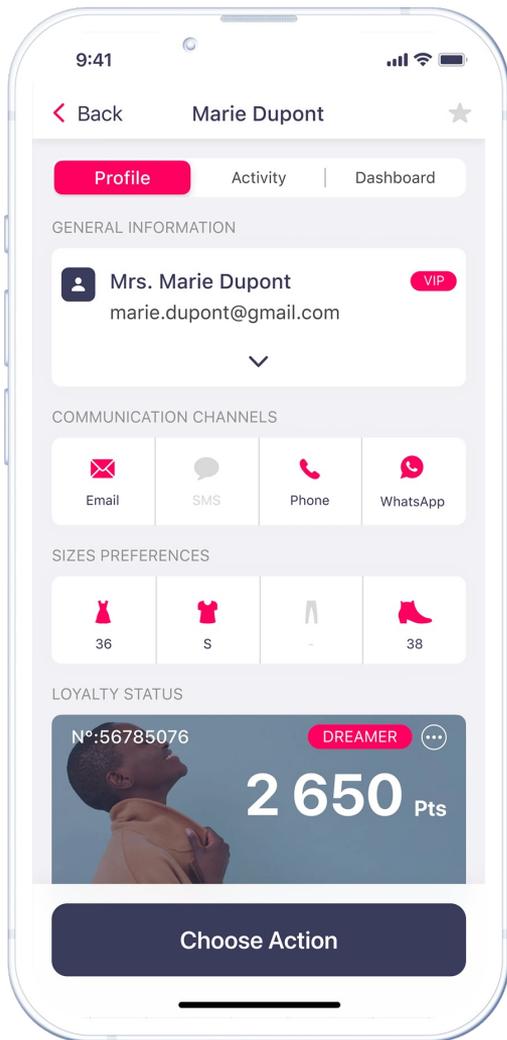


The screenshot displays the Salesforce Marketing Cloud interface. At the top, there is a search bar with "All" selected and a search icon. To the right of the search bar are icons for favorites, a plus sign, help, settings, notifications, and a user profile. Below the search bar is a navigation menu with tabs for "Email", "Overview", "Content", "Subscribers" (which is active), "Interactions", "A/B Testing", "Tracking", and "Return Path Platform".

The main section is titled "Profile Management" and includes three preview options: "Preview Profile Center", "Preview Salesforce Center for Leads", and "Preview Salesforce Center for Contacts". To the right of these options are icons for settings, a list view, a pencil (edit), and a refresh icon.

<input type="checkbox"/>	Order	Name	Description	Data Type	Hidden	Read-Only
<input type="checkbox"/>	1	Email Address	System default for subscribers...	Text	No	No
<input type="checkbox"/>	2	Last Name		Text	No	No
<input type="checkbox"/>	3	First Name		Text	No	No
<input type="checkbox"/>	4	DOB		Text	No	No
<input type="checkbox"/>	5	Gender		Text	No	No
<input type="checkbox"/>	6	Address 1		Text	No	No
<input type="checkbox"/>	7	Address 2		Text	No	No
<input type="checkbox"/>	8	Zip or Postal Code		Text	No	No
<input type="checkbox"/>	9	Language		Text	No	No
<input type="checkbox"/>	10	Mobile Number		Text	No	No
<input type="checkbox"/>	11	Twitter Handle		Text	No	No
<input type="checkbox"/>	12	Follows on Twitter		Text	Yes	No
<input type="checkbox"/>	13	Likes on Facebook		Text	Yes	No
<input type="checkbox"/>	14	Facebook Friends		Text	Yes	No

# Marketing



In-store





## CZYNNIKI NAJSILNIEJ WPŁYWAJĄCE NA OCENĘ OGÓLNA PROPOZYCJI<sup>1</sup>



**ZAUFANIE I  
NIEZAWODNOŚĆ**

**#1**



**ŁATWOŚĆ ROBIENIA  
ZAKUPÓW**

**#2**



**PRODUKTY  
DOSTOSOWANE  
DO MNIE**

**#3**

1. Q: Jaki był główny powód zakupów w [MARKA]?

Źródło: OC&C Retail Proposition Index 2023, Analiza OC&C.

OC&C Retail Proposition Index 2023

**01**

### Digital Elevates Physical Shopping

Shoppers expect seamless experiences on the digital channels of their choice. Sixty percent of shoppers say they have used their mobile device in a store.

**02**

### Stores Become Experience Differentiators

Store associates go beyond checkout to help retailers deliver unique experiences. Associates spend 74% of their time on activities unrelated to checkout.

**03**

### Intelligent Insights Spark Personalized Engagement

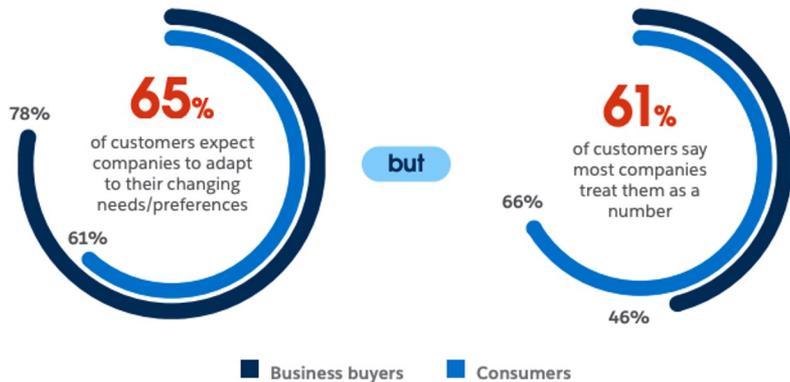
Retailers embrace unified platforms to enable personalization. Sixty percent of retailers are in the strategy or execution phase of their unified shopper engagement platform journey.

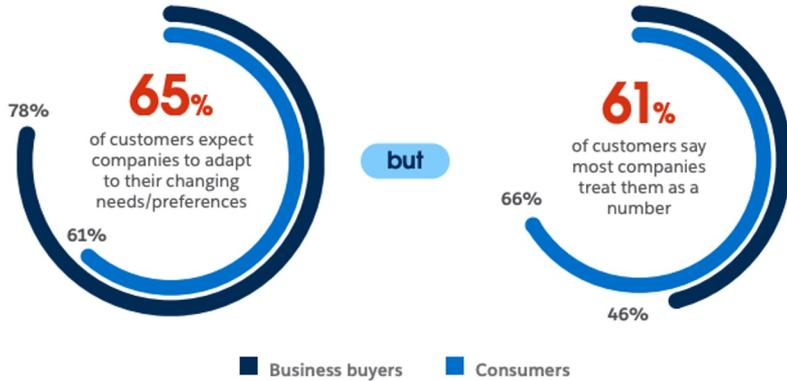
**04**

### Excellent Customer Service is Table Stakes for Shoppers

Bad customer service undermines loyalty. Seventy-four percent of shoppers say it takes no more than three bad experiences for them to abandon a brand.

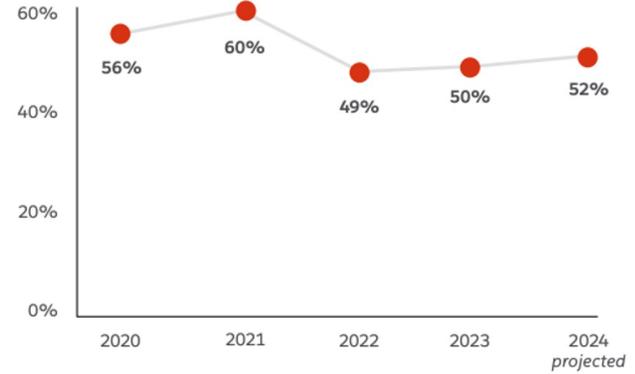
Connected Shoppers 2023 (5th edition) | Salesforce



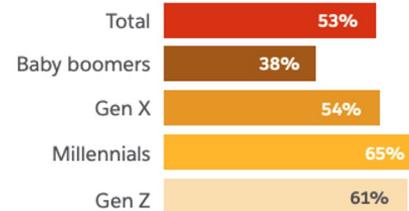


### Online/Offline Split Evens Out

Estimated Share of Customer Interactions Taking Place Online



### Customers Who Prefer to Engage Digitally





Po co?  
Gdzie w tym \$\$\$?

# Data Cloud Value Map: Business Outcomes

2024 Retail Summit

*Compound the impact of core value drivers by leveraging richer customer profiles and delivering more personalized & timely customer experiences*



## Strategic Objectives

- 3
- Business Outcomes
- Drive Customer Growth
  - Inc. Customer Lifetime Value
  - Deliver Operational Efficiency



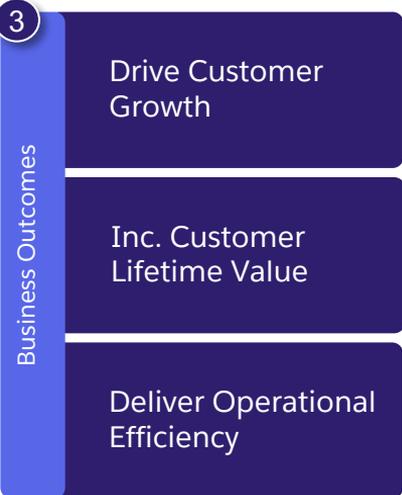
# Data Cloud Value Map: Business Outcomes

2024 Retail Summit

Compound the impact of core value drivers by leveraging richer customer profiles and delivering more personalized & timely customer experiences



## Strategic Objectives



## Value Drivers (KPIs)

- ↑ Multiplier effect
- ↑ Speed to value
- ↑ Data quality (AI/ML applications)
- ↑ Accelerate Acquisition
- ↑ Drive Engagement (conversion)
- ↑ Improve Reactivation (activation & retention)
- ↑ Cross-sell / Up-sell
- ↑ Opportunity Conversion
- ↓ Revenue leakage
- ↑ Customer retention / CSAT
- ↓ Case resolution time / AHT
- ↓ Cost to Serve
- ↑ Partner Opportunity Conversion
- ↑ Inc.d Share of Wallet
- ↑ Partner retention
- ↑ Business Analyst / Ops productivity
- ↓ Security & Compliance risk



- 86% first contact resolution
- 88% fan satisfaction
- 99.6% email delivery rate



- 48% Inc. in CTRs
- 55% faster customer journeys
- 4 fewer days to maintain campaigns
- Marketing approvers reduced from 21 to 2



- \$11 saved / service call
- 42% faster time to launch new products
- 90 hrs saved per API integration built



- Double-digit Inc. in ACV
- 70% Inc. in agent satisfaction

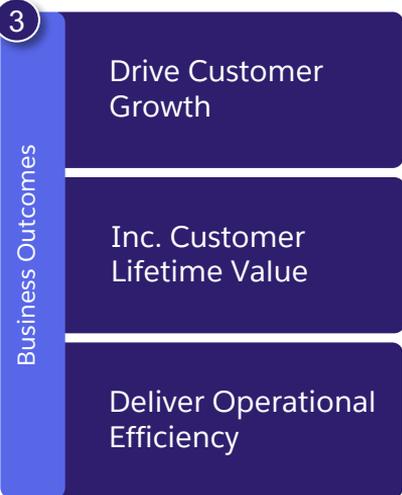
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# Data Cloud Value Map: Business Outcomes



Compound the impact of core value drivers by leveraging richer customer profiles and delivering more personalized & timely customer experiences

## Strategic Objectives

## Differentiated Capabilities

## Value Drivers (KPIs)

3

Business Outcomes

Drive Customer Growth

Inc. Customer Lifetime Value

Deliver Operational Efficiency

### Platform

- **Data Volume:** richer customer profiles enabled by exponentially larger data sets
- **Speed to Value:** near real-time processing speed
- **Cross-cloud:** synchronization of data across clouds

### Marketing

- Near real-time **segmentation** and **activation**
- Calculated **profile insights** without programming
- **Out-of-the-box** profile & **segment analytics**
- **Unified Customer Profile** to drive campaign efficiency and effectiveness

### Sales & Service

- **Complete 360** customer view
- **Near real-time data** and alerts from actionable insights
- **Forecasting, collaboration, and lead-pass across multiple orgs** (geos or BUs)

### Partners

- Convert potential customers to known, unified profiles to generate **higher quality leads** for partners (e.g., distributors, dealers)
- **Visibility into partner engagement** across multiple channels to develop tailored messaging and content

### Strategy & Operations

- **Analytics & insights** driven by AI
- **Complete 360 operational view**

↑ *Multiplier effect*

↑ *Speed to value*

↑ *Data quality (AI/ML applications)*

↑ *Accelerate Acquisition*

↑ *Drive Engagement (conversion)*

↑ *Improve Reactivation (activation & retention)*

↑ *Cross-sell / Up-sell*

↑ *Opportunity Conversion*

↓ *Revenue leakage*

↑ *Customer retention / CSAT*

↓ *Case resolution time / AHT*

↓ *Cost to Serve*

↑ *Partner Opportunity Conversion*

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**Wygląda prosto...**



# But connecting all of your Data isn't easy

Web and Mobile

ML Platforms

ERP

Point of Sale

Order Management



Case Management

Data Lakes & Warehouses

Financial Management

Analytics

Human Resources

Knowledge Articles





# Businesses have islands of trapped data

**71%** of company applications are disconnected





**IF IT WAS  
EASY,  
EVERYONE  
WOULD BE  
DOING IT,  
AND YOU  
WOULD  
NOT  
HAVE AN  
OPPORTUNITY**

Heavy Investment in Data Engineers & Data Science

Complex Architecture & DIY Technology

LLMs / Gen AI  
<5% Create      <15% Fine Tune      80% RAG (Data Centric)

\*Parson

# Leaders in the Customer Data Platform category



Figure 1: Magic Quadrant for Customer Data Platforms



Source: Gartner (February 2024)

Gartner



# Leaders in the Customer Data Platform category



Figure 1: Magic Quadrant for Customer Data Platforms



Source: Gartner (February 2024)





# How Data Cloud Works

CRM Data



1P Data

3P Cloud Storage



Any Device



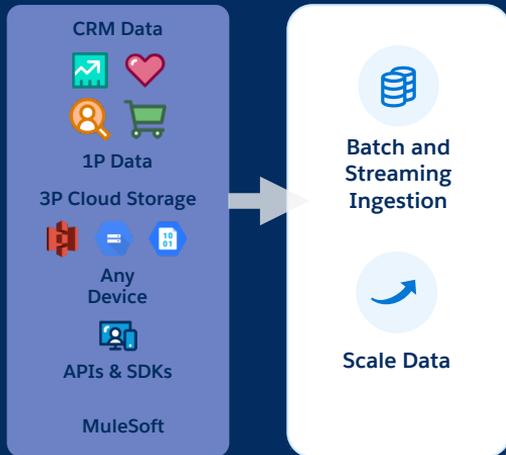
APIs & SDKs

MuleSoft

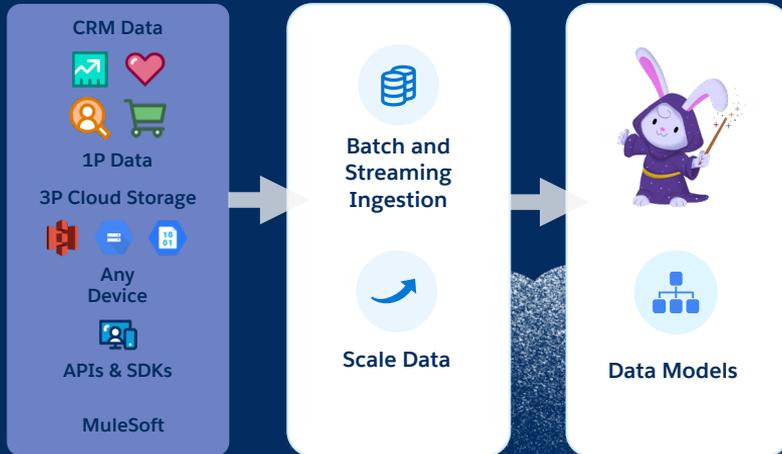




# How Data Cloud Works



# How Data Cloud Works





# Data Mapping

Map disparate data source structures to a common model

## Disparate Schemas



## Data Map

The screenshot shows the Salesforce Data Lake Objects interface. The main area displays a 'Contact Mappings' view with a central mapping diagram. The diagram shows various source fields (like 'Account ID', 'Assistant's Name', 'Assess. Phone', 'Birthdate', 'Created By ID', 'Created Date', 'Department', 'Contact Description', 'Email', 'Email Business Date', 'Email Business Reason', 'Business Fax', 'First Name', 'Home Phone', 'Contact ID', 'Deleted', 'Last Activity', 'Last Step-in-Touch Request Date', 'Last Step-in-Touch Save Date', 'Last Modified By ID', 'Last Modified Date', 'Last Name', 'Last Referenced Date', 'Last Viewed Date', 'Lead Source') being mapped to a central 'Contact' entity. The interface also includes a navigation menu with options like 'Home', 'Data Streams', 'Data Prep', 'Data Lake Objects', 'Data Model', 'Identity Resolutions', 'Segments', and 'Activations'. A search bar and a 'Recently Viewed' list are visible at the top.

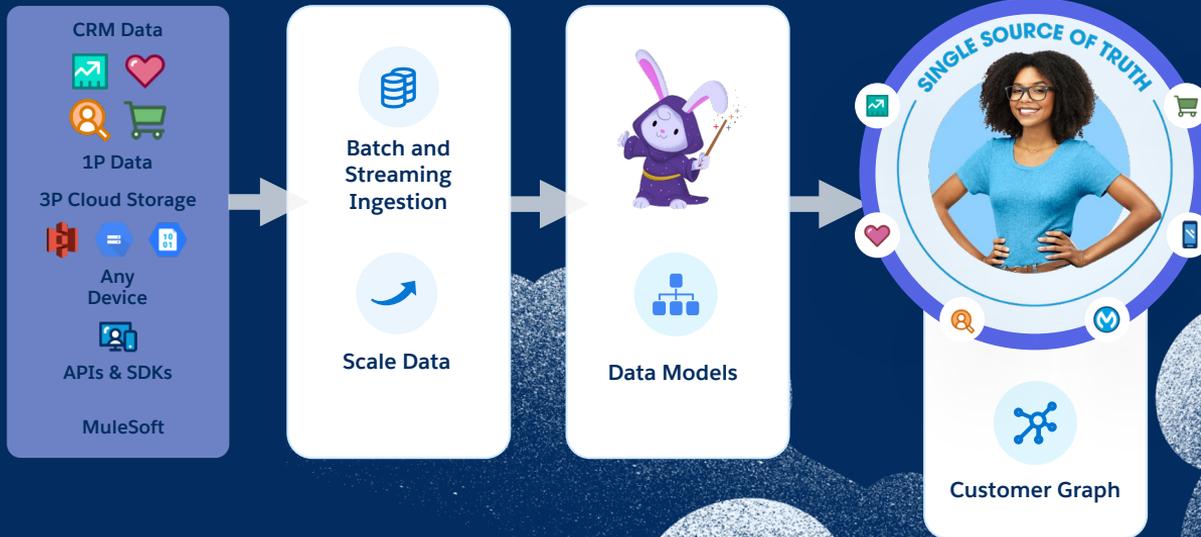
## Canonical Data Model

**Individual**

- firstName
- lastName
- middleName
- preferredName
- militaryServiceId
- birthDateDay
- birthDateMonth
- birthDateYear
- birthDate
- contactPointEmailId
- mailingAddressId
- mobilePhoneId
- leadSource
- ...

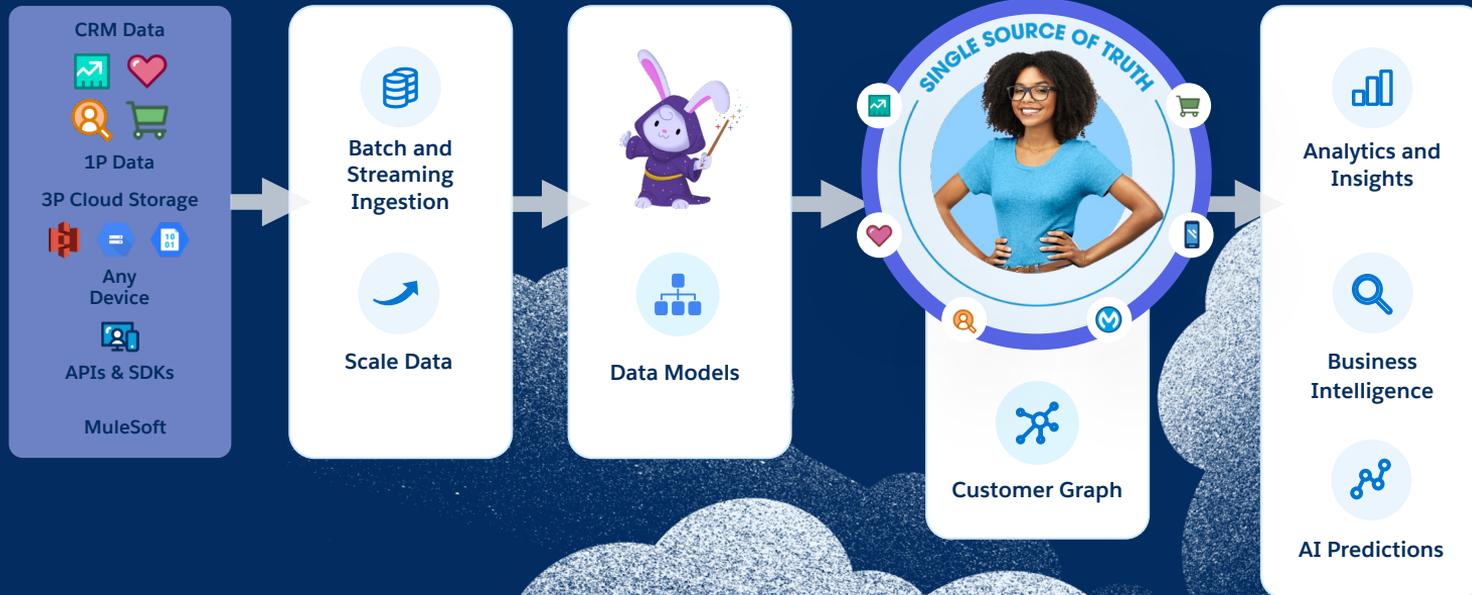


# How Data Cloud Works

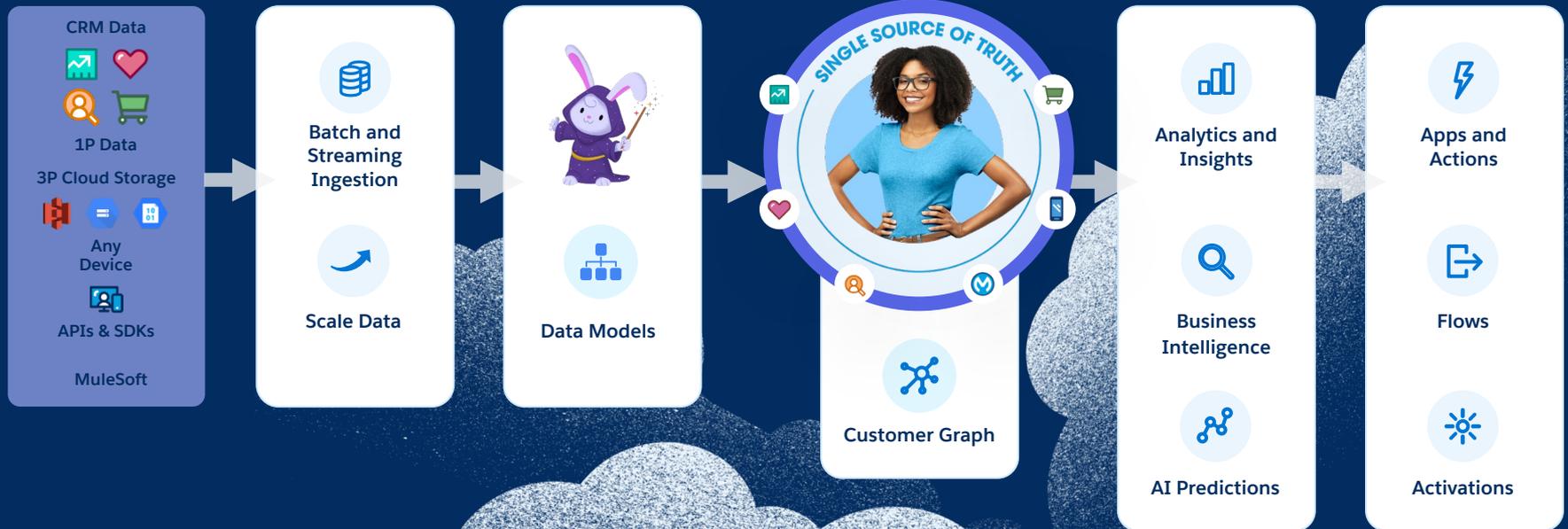




# How Data Cloud Works



# How Data Cloud Works



# Einstein 1

Now AI works for business & everyone can be an Einstein

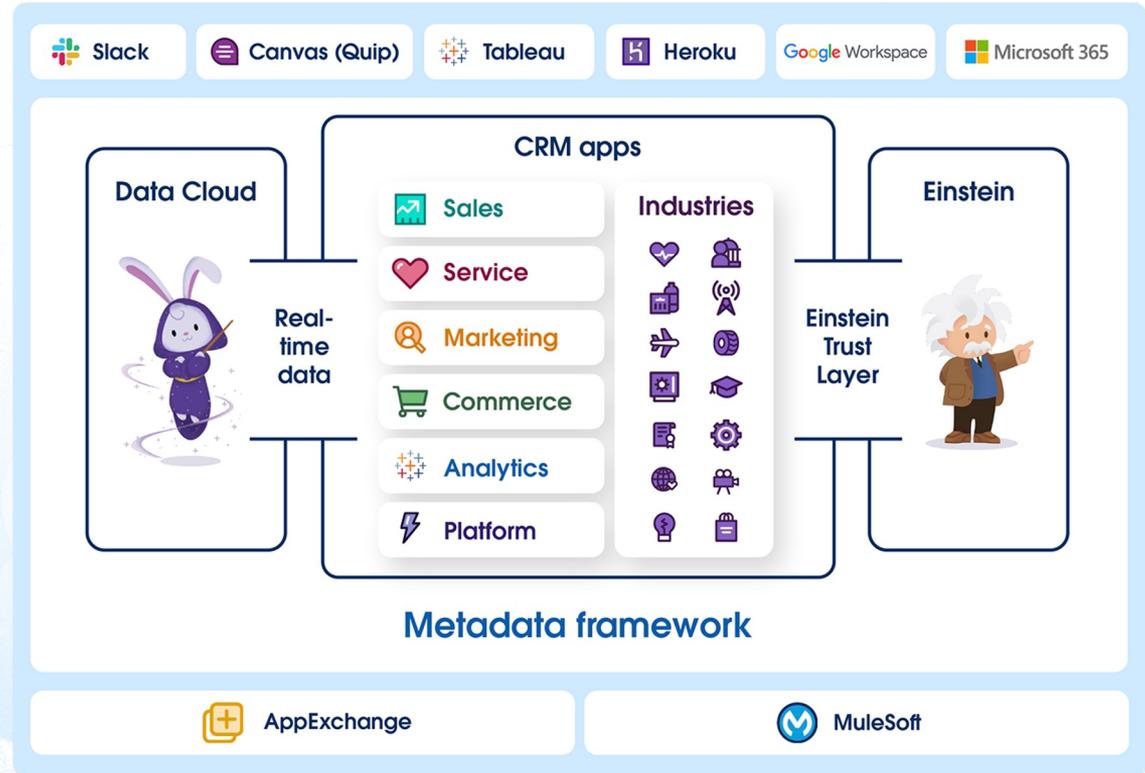
Integrated

Intelligent

Automated

Low code & pro code

Open





# Formula 1 Wows 500M+ Fans With Salesforce

Delights fans with personalization based on location, content preferences, and favorite driver

Creates real-time fan journeys full of one-of-a-kind offers and exclusive deals

Offers meaningful interactions to turn new fans into loyal ones and fuel sustained growth worldwide

Achieves net zero by 2030 with the ability to track, analyze, and report on carbon emissions

Partners with Salesforce experts to co-create roadmap of the ultimate fan experience



Global Partner of Formula 1®



- Platform
- Sales
- Service
- Marketing
- Net Zero
- Partners
- Success
- Data



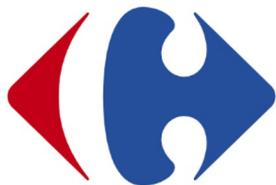
# Carrefour Pioneers the Rise of the DigitalRetail Company

Unlocks robust ecommerce platform to handle significant spikes in traffic without impacting the digital experience

Creates a single view of each customer to deliver a seamless omnichannel shopping experience and simplify customer service

Gains access to more data to create unique customer journeys delivering over 400 million personalized emails per year and increasing customer satisfaction

Continues to unify technology stack to pursue vision of becoming a DigitalRetail company by 2026



13k

Global locations in over 40 countries

20%

Increase to NPS between 2021 → 2022



“Salesforce gives us the freedom to focus on our core mission: making our customers' lives better”

Miguel Ángel González Gisbert  
Global Chief Technology & Data Officer



GUCCI



# Creating Sophisticated and Personalized Customer Experiences

Engages customers with push messages and notifications based on their physical location, to connect with them in real time, across all channels and based on their shopping behaviour and trends

Uses AI text enrichment to empower each client advisor with a distinctive, 'Guccified' tone of voice that will enrich customer conversations

Allows customer service agents to connect with customers across WhatsApp, SMS, and WeChat, enhancing sales by sharing product purchase links

Creates business insights across HR, finance, retail, and supply chain departments to facilitate more intelligent decision-making

**155%** increase in click-through rate

**50%** increase in conversions

**16%** increase in revenue over five campaigns

**9 months**



Service



Marketing



Tableau



MuleSoft



Slack



Partners



Success



AI



GUCCI



# AI amplifies the Gucci voice across client service centers

Uses AI text enrichment to empower each client advisor with a distinctive, 'Guccified' tone of voice that will enrich customer conversations

Customized dashboards ensure advisors have powerful data and insights at their fingertips

Moves customer service agents away from set templates and accelerates their learning curve

AI-generated replies have shortened the learning curve for new team members by training them on the Gucci voice quicker and more intuitively.

Scales easily to accommodate peaks in demand, such as Black Friday and Christmas



AI



Service



Marketing



Tableau



Slack



Partners

4K

AI-generated chats

30%

Increase in conversions

"Secure and certified data are at the heart of Gucci AI solutions. Our customers trust us when they put their personal data in our hands."

Gilberto Tosca  
Chief Technology & Information Officer



# How Home&You multiplied Conversions in its Online Shop with AI Recommendations

AI recommendations in the web shop provide 10 % rise of the number and value of the products in the basket

Cart abandonment reduced by using transactional emails: Abandonment dropped from 75% to 26 %

Newsletter conversion rate is 19%

50% less time in case resolution thanks to standardization and omnichannel approach in customer service processes with Service Cloud

All information in one place -> 360 degree overview of the customer



Marketing Service

<6

Months  
Time to Market

3x

less abandoned  
baskets

50%

less time in case  
resolution



Tomasz Żelazny  
E-Commerce  
Director

"We wanted to increase the number and value of products in the shopping cart by at least 5%. We have significantly exceeded this minimum target and are now at 10%."



“From zero customer data to big data in two years - thanks to Salesforce.”

Bartosz Zaborowski

Head of E-Commerce, Ziaja, Poland



## How Ziaja augments shop advisors with digital, behavioral and offline data

**Human-first-approach:** With Salesforce Personalisation, shop assistants got an efficient solution for upselling new products based on customer preferences. This allows Ziaja to sell 3-5 products more per day in each store.

With Marketing Engagement & Personalisation, Ziaja manages segmentation dynamically and in real time and as a result won many new loyalty club members.

Ziaja is able to deliver a great phygital experience thanks to new technologies that link in-store retail and e-commerce to improve customer experience.

**100%**

return of implementation costs  
after 3-4 months

**125,000**

loyalty club members  
within 1 year

**+180**

personalised POS



MARKETING



INTEGRATION



TRAILHEAD



SERVICE



DATA





# Jak jeszcze monetyzować dane 1P?



# What is Retail Media?

Retail media is an advertising business that a retailer sets up to allow advertisers to buy advertising space across the retailer's owned (onsite) properties and paid (offsite) media, using consumer data to connect with target audience throughout the buyer journey.

# Retail Media's potential value

WIN-WIN-WIN for consumers, brands and retailers



## *For consumers*

Targeted advertising that is relevant and addresses their needs and desires



## *For brands*

Direct access to the targeted market and measure campaigns against product sales



## *For retailers*

Build a high-margin business to drive E-commerce innovation



BCG May 2021

# The \$100 Billion Media Opportunity for Retailers



Apr 2021

Amazon's ads business is generating nearly \$7 billion a quarter, and growth is accelerating

BUSINESS INSIDER

Sep 2021

Walmart's advertising business doubled as the retailer continues its mission to morph into an ad giant

WSJ Nov 2020

## How Walmart, Kroger Plan to Become Advertising Giants

Retail titans can capitalize on the pandemic-driven surge in e-commerce by revving up their online-advertising plans



*A million dollars isn't cool.  
You know what's cool?*

Progressive GROCER Aug 2021

Target Hires Google Exec to Lead Retail Media Company

# Value of Personalisation



The ██████ example

Total Revenue B\$

**648**

+5,5%  
YoY

Online: 100B\$

Retail Media Revenue B\$

**3,4**

+28%  
YoY

Takeaway

0,5% of Revenue  
contribute  
10% to profit!

Operating Profit B\$

**27**

+10,2%  
YoY

RM Operating Profit B\$

**2,72**

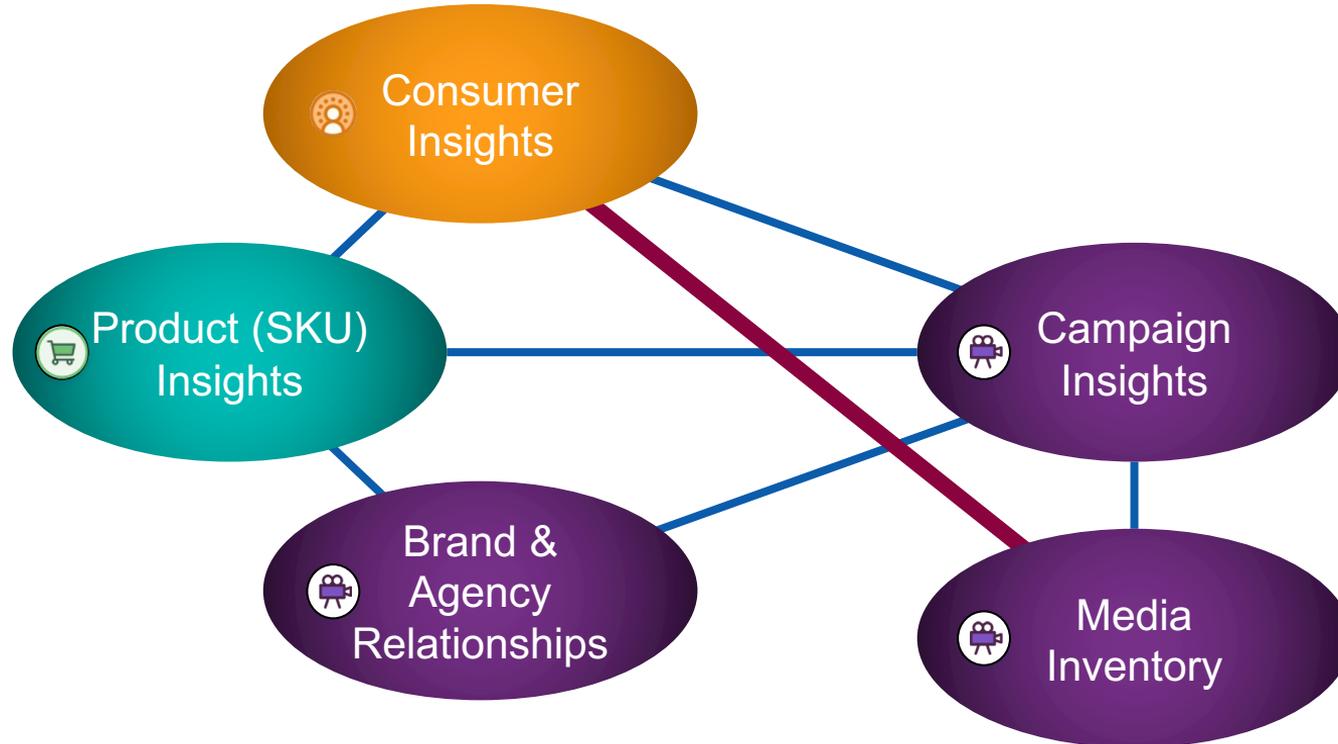
considering 80% margin

Retail Media is  
changing Grocery

...  
and  
Personalisation is  
at the center of  
everything

# Single View of Truth for Retail Media

helps finding the best **Inventory** and **Target Segment** for a Brand & Product





# Retail Media Solution Overview

Supercharge your Retail Media Network with automated, intelligent, real-time data across every aspect of advertising operations

## CAMPAIGN PLANNING

## EXECUTION

## REPORTING

## OPTIMIZATION

## AD SALES & OPERATIONS

## ACCOUNT MANAGEMENT

## 1ST PARTY DATA MANAGEMENT

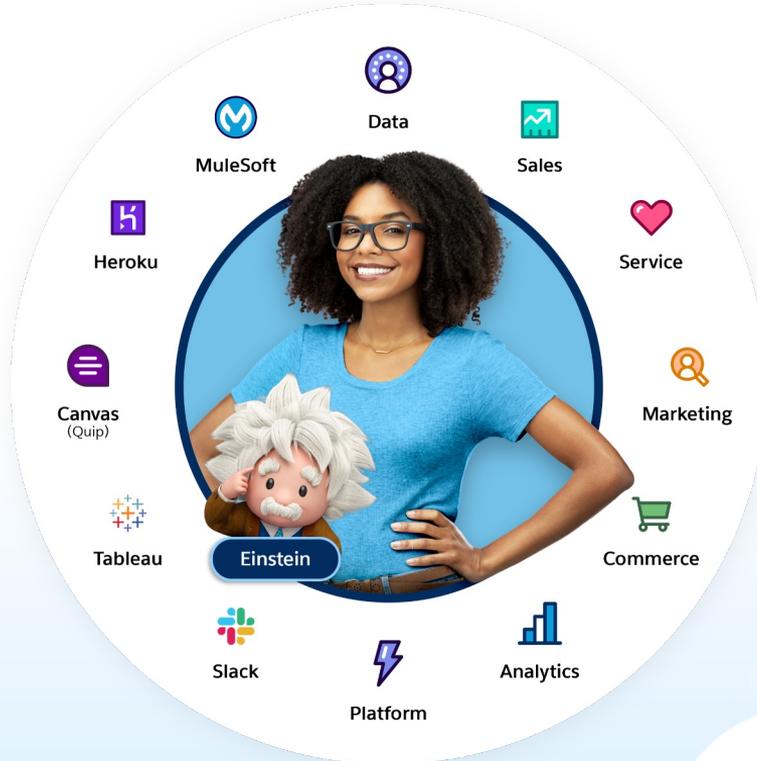


Advertising Sales & Operations for Retail





# Customer 360 is your single source of truth



Kluczowe wnioski

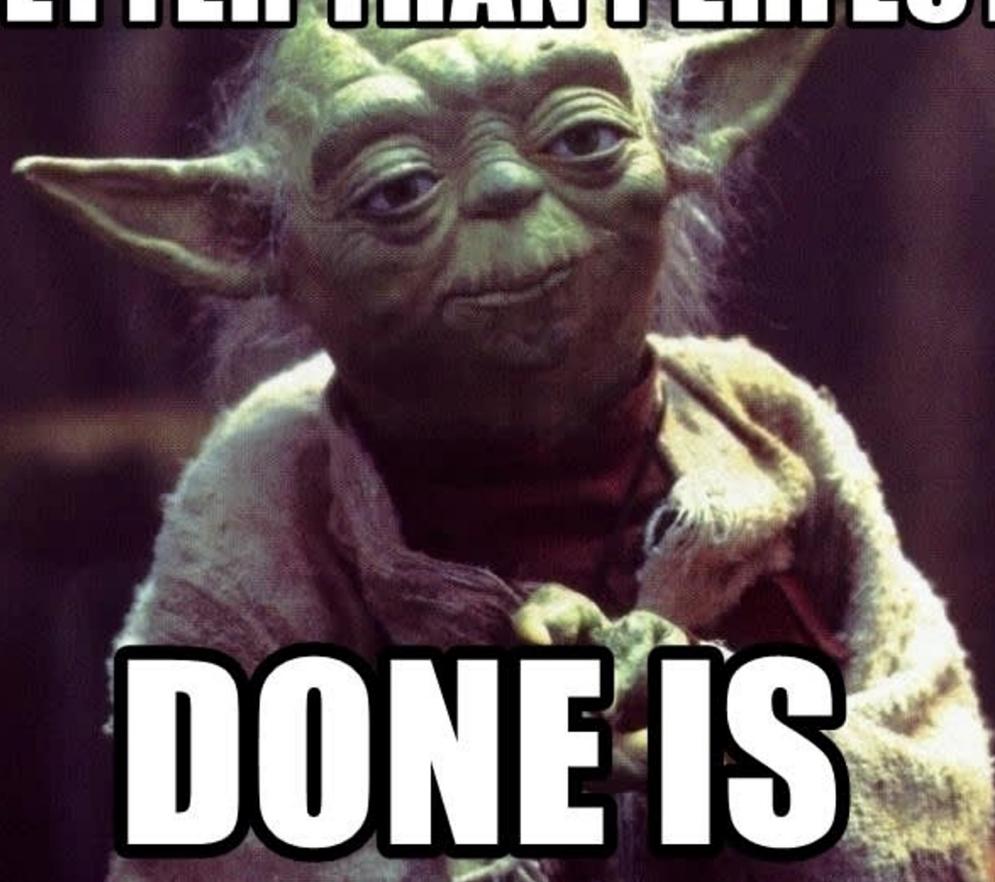
**#1 Unikalny profil klienta to nie złoty graal – tylko procesy, kompetencje i technologia. Inni już to robią**

**#2 Dane 1P to budowanie Waszej przewagi i revenue (personalizacja online & offline, retail media)**

**#3 Start now, don't stop, i pamiętaj:**



**BETTER THAN PERFECT**



**DONE IS**



# Dziękuję!

**Salesforce >> stoisko #14**

**Sukces w Retail: Wykorzystanie  
danych, sztucznej inteligencji  
i CRM**

**Dziś, godz 12.20, scena główna**

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