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## Intro:

The best businesses have always been defined by agility. But in today's changed world, agility is no longer a competitive advantage–it's table stakes to survive. What, then, drives competitive advantage moving forward? The answer is smart analytics.

## Smart analytics powered by AI help sales and service teams quickly move from insight to action, directly in Salesforce.

You can't deliver this level of personalized, intelligent insight with a disconnected tech stack–especially one not specifically designed for sales and service teams. It's difficult to expect employees to work with and learn multiple, disconnected applications. That's why so many advanced analytics projects fail. They can't scale if only a portion of your teams use intelligent analytics to drive their work.

Customer-facing teams need actionable insights–delivered when and where they need it, in the flow of work–to make faster and smarter decisions.

# 67%

of US-based companies agree that adopting AI technology has helped them create better customer experiences.

Source: PwC AI Predictions, 2021

# The time is now, and the goal is attainable.

## Intro:

This guide will help you understand how to take advantage of smart, connected analytics directly in Salesforce CRM. We'll cover key questions, including:

- How do you move decision making closer to the point of customer impact?
- Why do you need AI-powered analytics if you already have reports and dashboards?
- Can you really get value from AI if you don't have a data science team?

## Contents:

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## Part 1

# The urgent need for AI-powered analytics

Sales and service teams are working hard to support customers in their goals, help your organization protect revenue, and grow faster than the competition. In a highly digitized world, these teams shouldn't have to go searching for insights they need.

## 79%

of service professionals say it's impossible to provide great service without a complete view of customer interactions

Source: 4th Edition State of Service Report, Salesforce

### Service agents are buried in a flood of cases. They need to know...

· Which cases are most likely to result in a lost customer?

· How should we prioritize responses to better engage customers and improve retention?

· What patterns can we find of customer issues to predict and head off future problems?

## 88%

88% of sales reps say current economic conditions make it important to anticipate customers' needs

Source: 4th Edition State of Service Report, Salesforce

### Sales reps are overwhelmed. They need to know...

· How can we predict which deals are most likely to close so we can work those most?

· With growing product complexity, what should we offer to each customer?

How do you personalize this for each service agent anad sales rep without asking them to build their own analyses, and deliver it right where and when they need it?
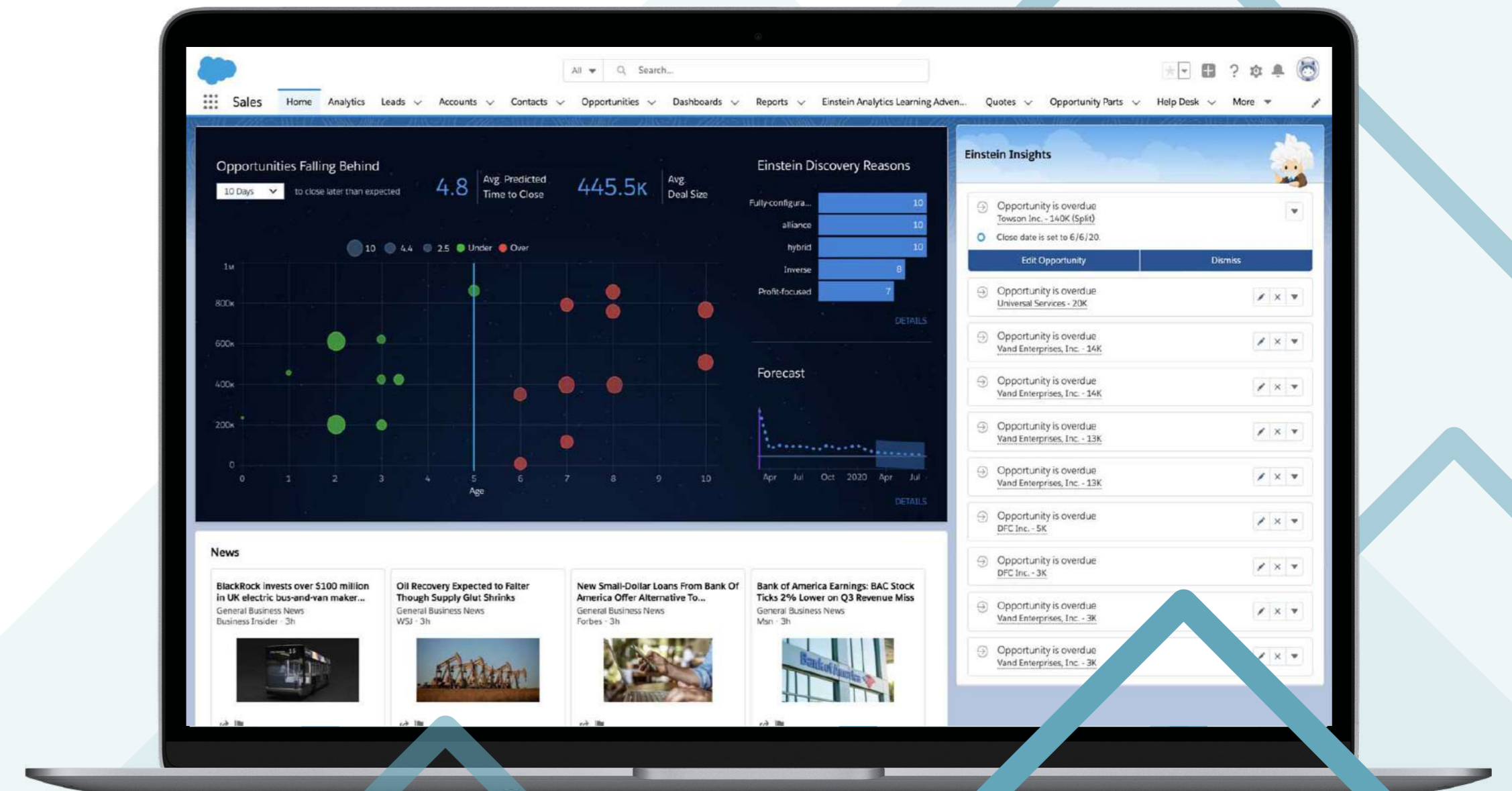
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**Customer-facing teams need actionable insights–delivered when and where they need it, in the flow of work–to make faster and smarter decisions.**
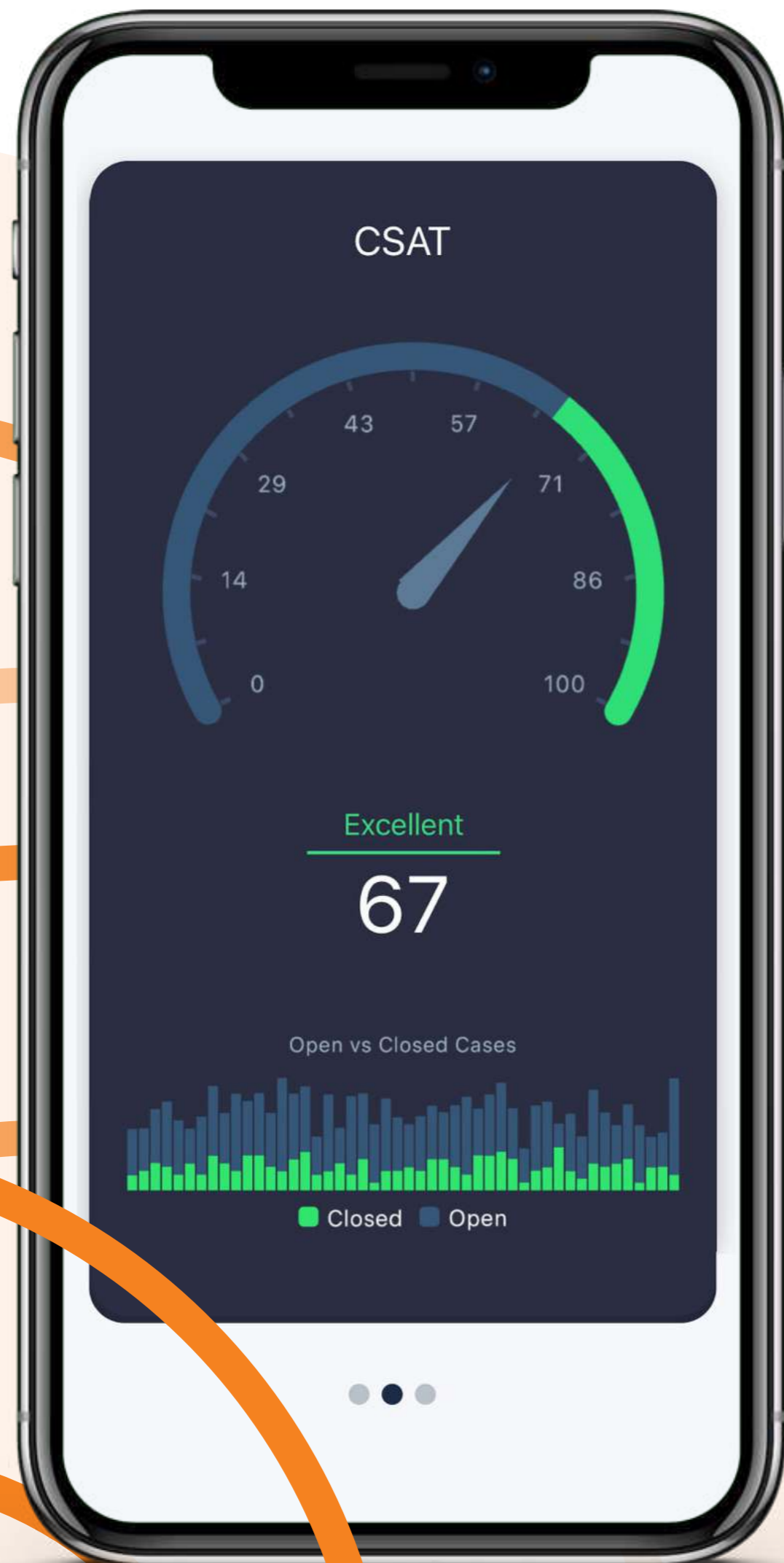
# 90%

of IT leaders say their company's revenue will be negatively impacted if they fail to complete digital transformation initiatives in the next 1-5 years.

Source: Mulesoft 2021 Connectivity Benchmark Report
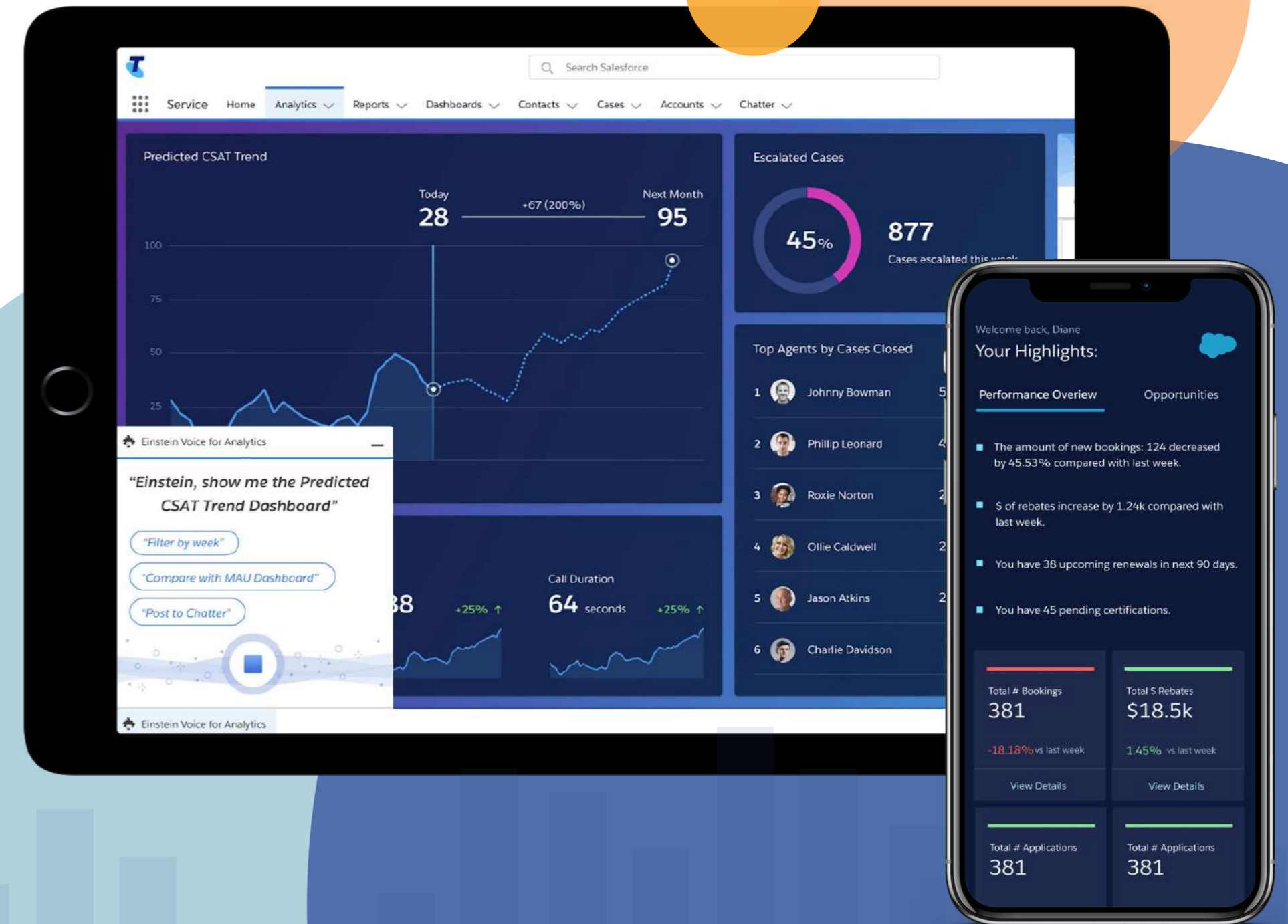
**Part 2**

# Put intelligence at the center of every customer interaction

## Bring intelligent insights closer to sales and service decisions

By automatically delivering intelligent insights within your CRM, sales and service teams can focus on taking action for the customer, instead of spending valuable time finding data and figuring out what it means.

When users have actionable, AI-powered insights at their fingertips–predictions for different business outcomes, recommendations on specific actions, and a complete view of their business–they can optimize every interaction to meet their sales and service KPIs.

### Telstra

#### Intelligent Insights in Your CRM

Telstra uses Tableau CRM to to predict an account's likely NPS score based on survey feedback captured from customers. This NPS score is embedded on the account level so sales and service reps can make smarter decisions when dealing with their customers.

"At Telstra, we're aiming to get intelligence into the hands of our business users right where they work. We have insights on what happened, why it happened and now we have added what could happen."

Svetlana Kuzmenkova,
product owner, Telstra
Watch the Dreamforce session
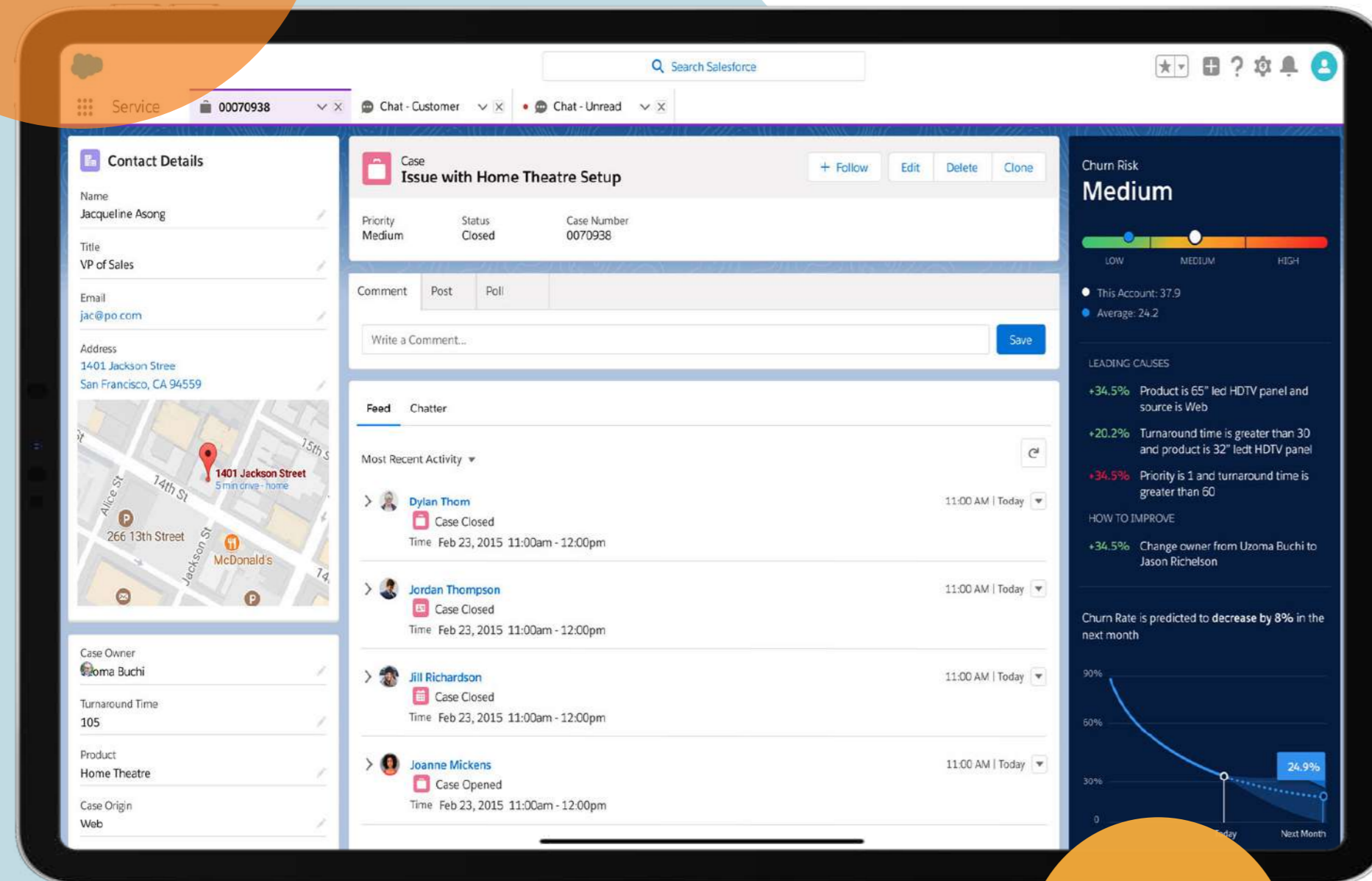
## Insights for service

Tableau CRM's predictive, prescriptive analytics helps Service teams understand the next steps they should take to accelerate case resolution and improve the customer experience.

**Reduce churn risk:**
Which accounts are at risk of churn that I should prioritize? What steps can I take to reduce that risk of churn, e.g. offer a discount, a service bundle, or a service pause?

**Increase CSAT/NPS:**
What is the customer's predicted CSAT experience? And how can I improve that during this interaction?
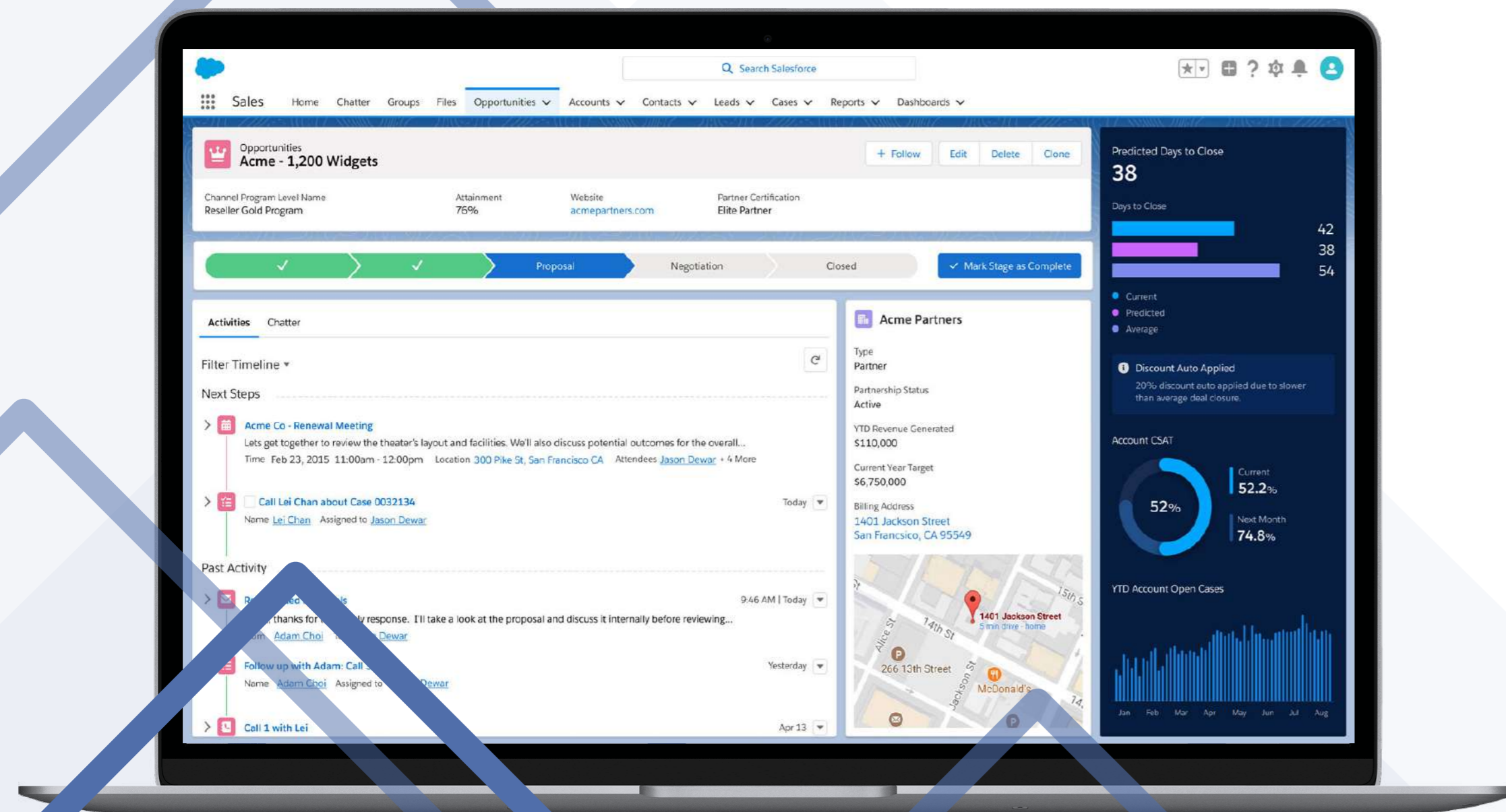
**Reduce likelihood of escalation:**
What can I do to resolve an issue without involving a manager or other resources?

**Decrease total time-to-resolution (TTR):**
What resources will help me resolve a specific case faster?

And many others....

## Insights for sales

Tableau CRM's predictive, prescriptive analytics helps Sales teams understand the next steps they should take to accelerate the sales process and improve sales outcomes.

**Increase conversion:**
What is the customer's likelihood to buy a specific product?

**Improve win probability:**
What can I offer a customer right now that would increase the chance to close a deal?

**Decrease time to close:**
What can I do today to accelerate the time to close this deal?

**Increase repeat business:**
What are the best options to improve the chance of renewals, cross-sells, and up-sells?

**Increase lifetime value:**
What actions should I take today and over time to build and deepen the relationship?

**Discount guidance:**
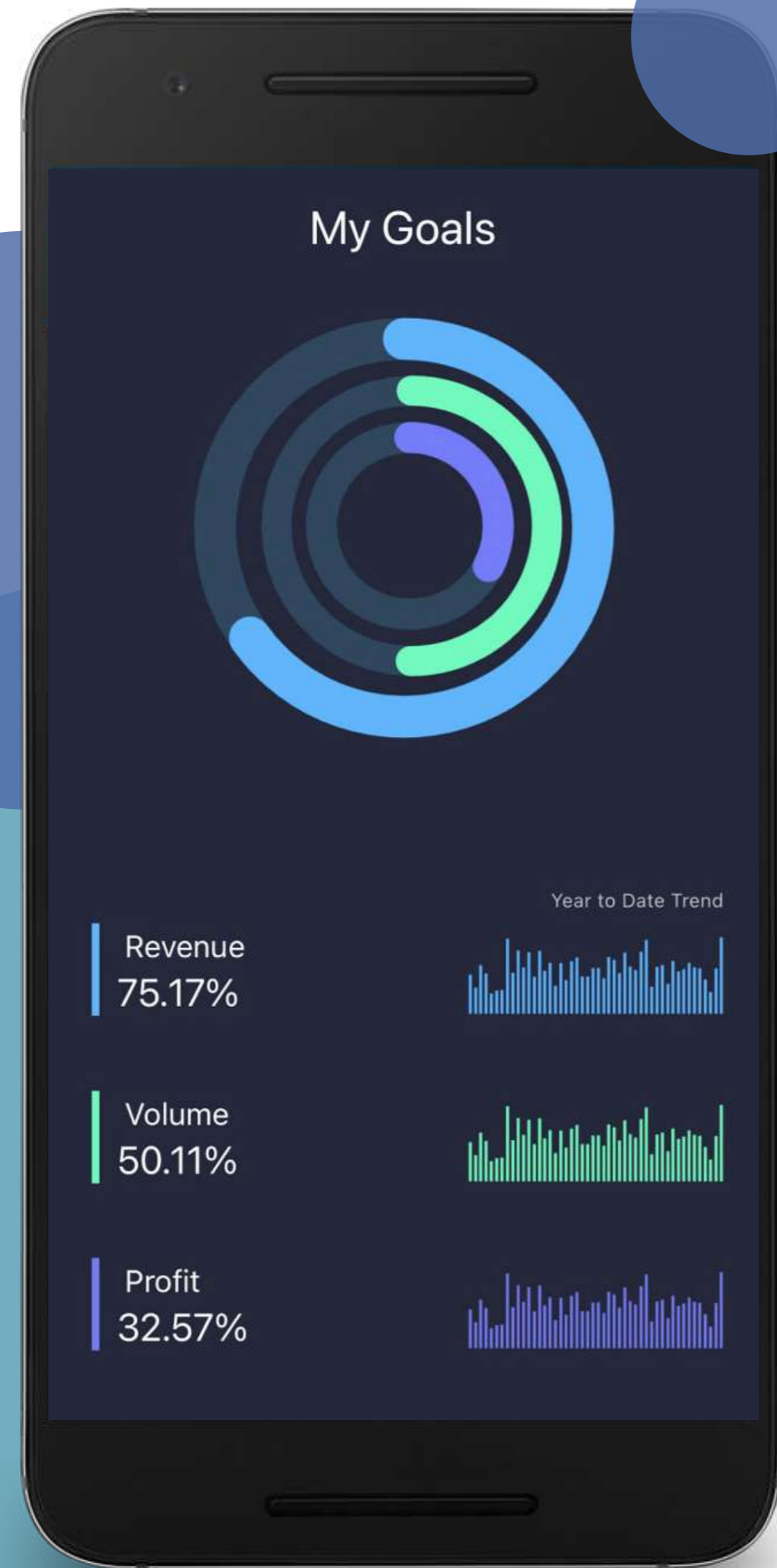What is price guidance for this particular bundle of products?

**Predict expected revenue:**
What is the likely size of a current opportunity? What is the likely overall value of a customer over time?

**Priority outreach:**
What open opportunities should I focus on today?

## My Goals

Year to Date Trend

Revenue
**75.17%**

Volume
**50.11%**

Profit
**32.57%**

# 89%

of IT leaders say data silos are an obstacle to digital transformation.

Source: Mulesoft 2021 Connectivity Benchmark Report

## AVAYA

### CRM, visual analytics, and AI enhance forecasting for sales teams and execs

Avaya uses Tableau CRM to deliver AI-driven predictions and recommended actions to sellers in real time, directly in their existing workflow. This includes propensity to buy, propensity to close in quarter, forecasting, account health checks, and opportunity scoring.

"The data and the self-service analytics are available to everyone, if they have permissions. So, rather than relying on analysts and reports, everyone can do the forecasting themselves."

Mariano Salatino,
Vice President of Sales Operations at Avaya
Read the case study
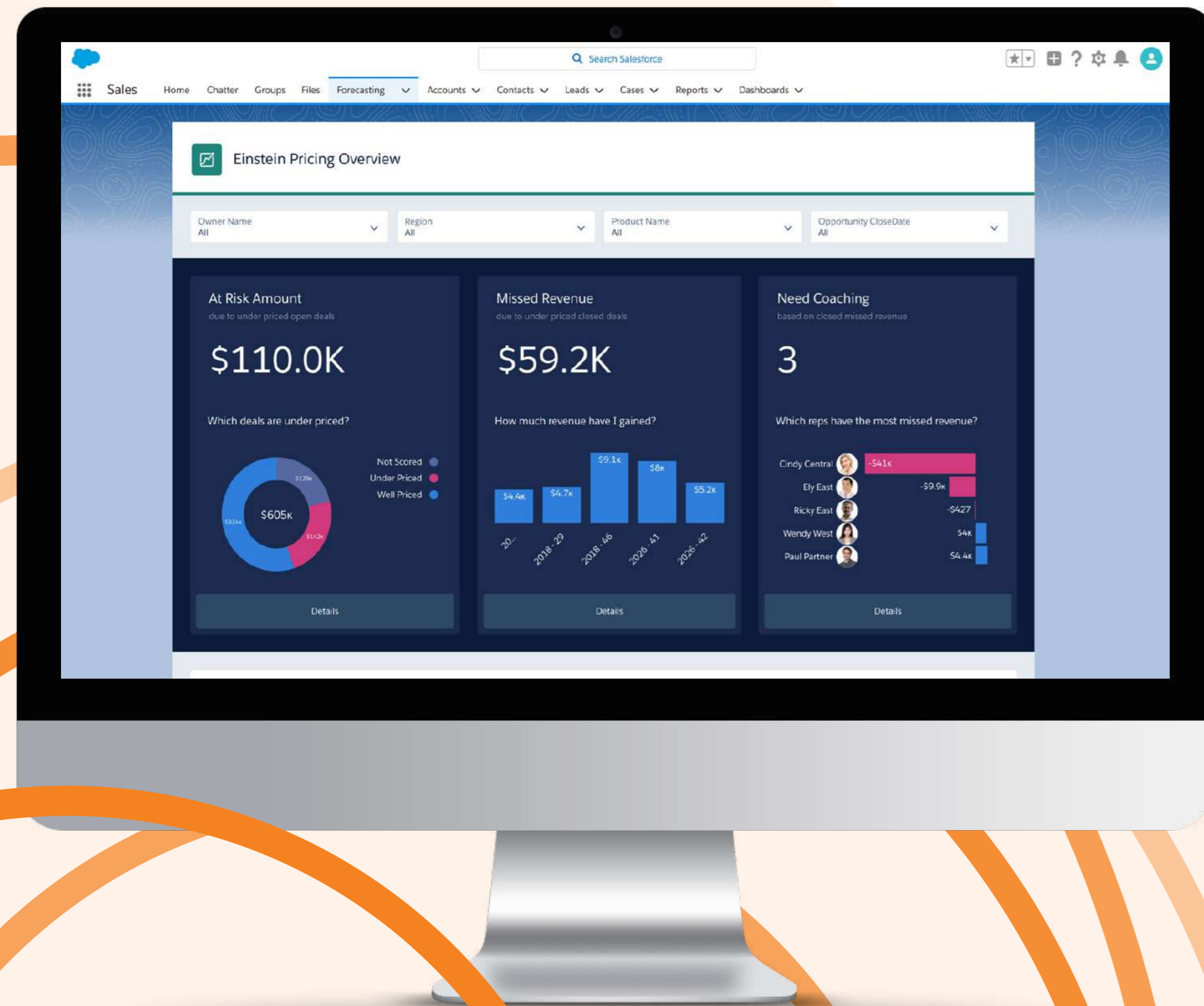
## Give business leaders access to AI-powered analytics

**Intelligent analytics isn't just for your customer-facing teams. It enables leaders throughout the business–across sales, service, marketing, and operations–to:**

- Access a 360-degree view of the business and drive toward impactful KPIs
- Identify white space/new opportunities
- Generate more accurate forecasts
- Predict shortfalls (and understand how to prevent them)
- Understand how teams are performing and where coaching opportunities exist
- Get a holistic view of trends driving the business
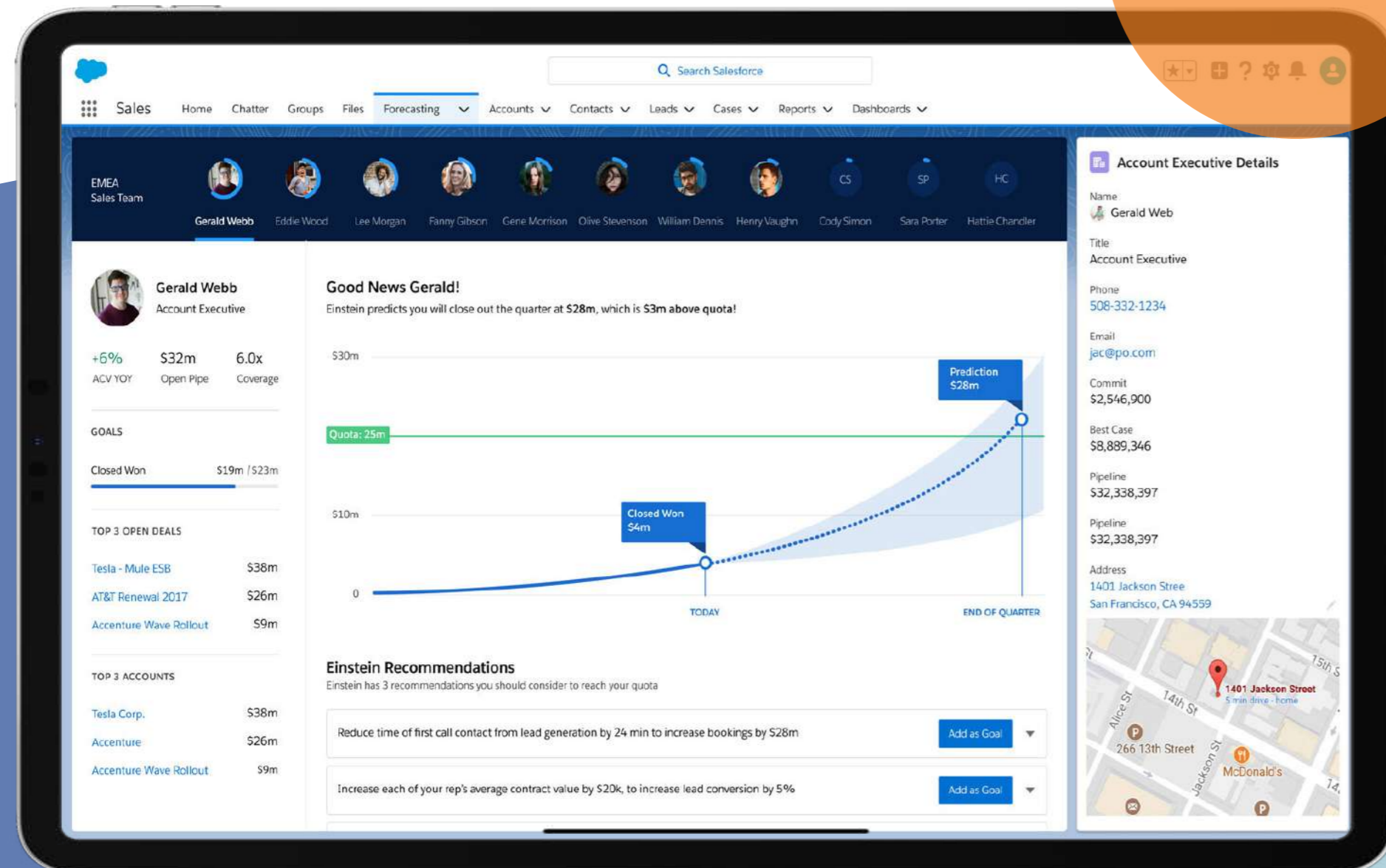
## Analytics native to Salesforce

**Tableau CRM is native to the Salesforce platform.**

1. It's built directly on the Salesforce platform–no integration work required.
2. It accelerates the delivery of intelligent insights to customer-facing users in the flow of work.
3. It delivers insights at scale, from both Salesforce and non-Salesforce data, to all Salesforce users.
4. Its no-code model accelerates AI usage at a fraction of the time and effort of traditional data scientist processes.
5. It inherits Salesforce's security, hierarchy, and permission settings.
6. It simplifies and streamlines the deployment of AI-powered analytics throughout Salesforce, helping you get more value from your Salesforce investment.

Learn more

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# Automate sales and service processes in a more intelligent way

When automation is working well, it's handling processes that don't require human expertise, freeing people up to work smarter and faster where it matters most. Productive employees can spend more of their time on higher-value interactions that deepen customer relationships and lead to better outcomes for the customers, and for the business.
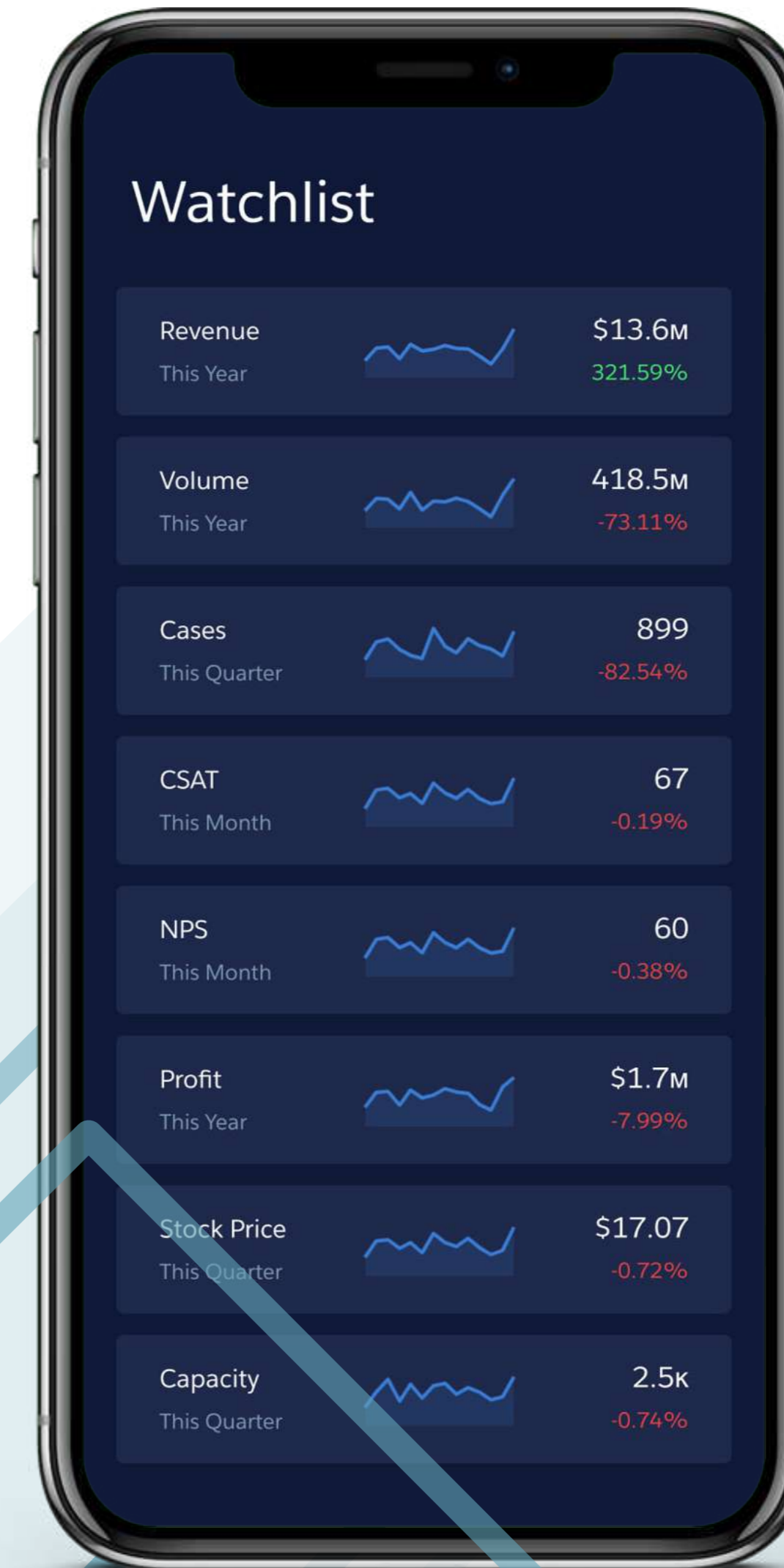
**In addition to delivering intelligent insights, you can also automate service and sales processes in an intelligent way. It's a shift from simple, rules-based automation to smart automation.**

For example, what if you could improve case resolution time by automatically approving a discount without having to manually route it to finance? Or what if you could remove friction in the sales cycle by automatically moving an opportunity to the next stage without the forms, steps, and tasks to request manager approval?

**eNGie**

**"Using Salesforce's automation solutions, we've dramatically cut down the time needed to go digital, allowing us to deliver better customer experiences."**

Marc Lallemand, CIO, Engie Belgium, (Salesforce News & Insights)

## Watchlist

| | | |
|---|---|---|
| Revenue<br>This Year | | $13.6M<br>321.59% |
| Volume<br>This Year | | 418.5M<br>-73.11% |
| Cases<br>This Quarter | | 899<br>-82.54% |
| CSAT<br>This Month | | 67<br>-0.19% |
| NPS<br>This Month | | 60<br>-0.38% |
| Profit<br>This Year | | $1.7M<br>-7.99% |
| Stock Price<br>This Quarter | | $17.07<br>-0.72% |
| Capacity<br>This Quarter | | 2.5K<br>-0.74% |

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# How to Get Started—Today

## Wondering where to start?

**Consider these questions to identify where to apply smart analytics to your sales and service workflows:**

1. What are the strategic initiatives and KPIs of the business? What is the million dollar question you're trying to answer?
2. How does your team's work align to those KPIs? Which workflows directly impact those KPIs?
3. What questions do you need answered? What is in the way of answering them?
4. What actions do you take / what decisions do you make on a regular basis? What do you wish you could do faster and with more confidence?

## Adopt an MVP mindset–start small, then iterate and expand over time.

Even if you have imperfect data, you can still gain powerful insights that will drive immediate business impact and also improve over time. *Tableau connectors* make it easy to pull in data from all of your data sources, and our *Fast Start Templates* help you get up and running quickly for every line of business and industry.

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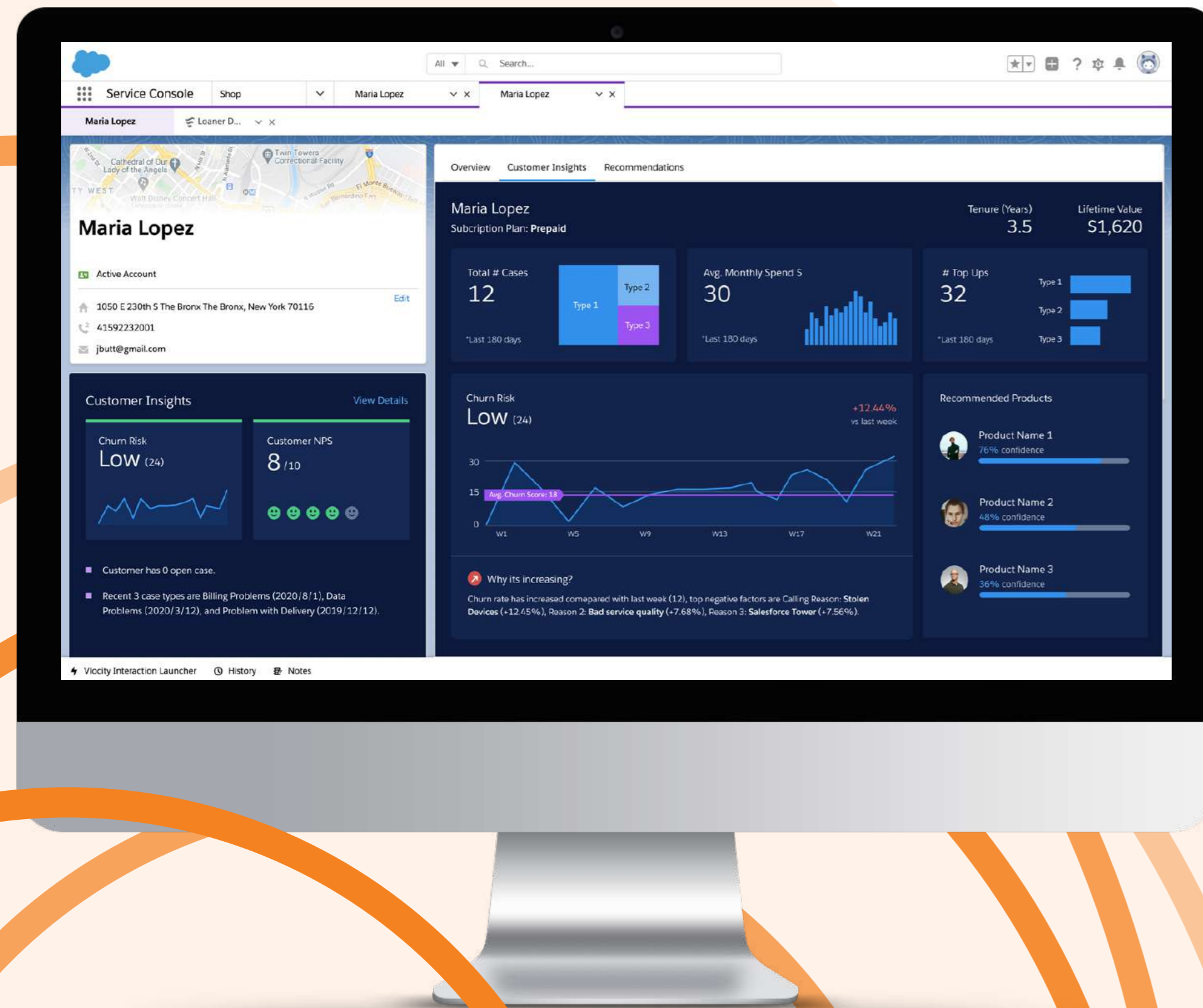


## Many customers start with the following use cases–but remember: every organization is different and you know best where you need to start!

### Service

- Likelihood of escalation
- Risk of churn
- Increase CSTA/NPS
- Decrease TTR
- Reduce handle time

### Sales

- Increase conversion
- Improve win probability
- Decrease time to close
- Increase repeat business
- Increase lifetime value
- Discount guidance
- Predict expected revenue
- Intelligent white space

## Learn more about using native, AI-powered analytics in Salesforce

**WATCH DEMO**       **CONTACT OUR TEAM**

# Thank you

**About Tableau CRM:** Tableau CRM (formerly known as Einstein Analytics) empowers your Salesforce CRM users with actionable insights and AI-driven analytics right in their workflow. Spot opportunities, predict outcomes, and discovery the story your data has to tell with Tableau CRM