

Customer Centricity:

The Heart of Digital Transformation Readiness



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Executive summary

Industries the world over are pivoting their business strategies to be more customer-focused, and utilities are no exception. The increased complexity of the energy transition is forcing utilities to adapt to a new world. This includes creating more competitive business models, focusing more on customer outcomes, and using data to become more efficient. Driven by the increased complexity of the energy transition, utilities will adapt to a world with new, competitive business models, a requirement to increase focus on customer outcomes, and using data to become more efficient.

Being first to market requires digital readiness, a digital backbone that enables strategic agility to

innovate quickly. It requires leadership to foster a culture of innovation across the enterprise, where all members of staff can become innovators. It also requires strong alignment between business units and IT to accelerate time to value.

If incumbents are to compete and win in future energy markets, conservatism must make way for agile innovation. Zpryme survey data suggests that while many are yet to make headway into this new world, some are emerging as leaders. This paper helps understand what a utility should assess in order to optimize their digital readiness.

Customers sit at the heart of digital transformation in every industry

The past two decades have witnessed an incredible acceleration of disruption across industries as ecommerce, digitalization, increasingly demanding customers, and environmental awareness have resulted in an extended period of constant disruption, innovation, and the reinvention of business models.

Most companies now recognize the need to create new business models focused on the customer as the critical input into a company's long-term strategic planning. Access to rich customer data sets and the ability to make this data actionable are now primary competitive differentiators, explaining why the biggest customer data aggregators, Amazon and Facebook, are so highly valued.



However, success is not guaranteed by access to customer data, but rather from how companies use this data. Companies that are primed to rapidly extract insights from customer data—those that are "digital-ready"—are most likely to succeed. Companies who have rich customer data sets yet lack the ability to extract their value will struggle to compete with more nimble rivals.





CX is at the heart of the energy transition

The utility industry is not immune to this unprecedented disruption. For the first time in its 120-year history, the core utility business model is fundamentally transforming. Climate change has prompted ambitious responses in energy policy due in large part to increasingly frequent and catastrophic weather events and wildfires that have a profound effect on utilities and their communities. The causes and responses to industry disruption are succinctly grouped around the so-called 4Ds of the energy transition: decarbonization, decentralization, democratization, and digitalization.

You don't have to scratch too far beneath the surface to see the changing needs of both residential and commercial/industrial energy customers at least partially behind each of the 4Ds in each area. Customers are increasingly aware of the environmental impact of energy use, and they wish to generate their own renewable power. They also

want more community-based energy, as well as more insights into their own energy use.

But the industry faces a problem. It must address the "Energy Trilemma," where the often-conflicting requirements of energy security, decarbonization, and affordability collide. While most energy policies can support two points of the trilemma, it is much more difficult to address all three. For example, keeping the lights on while decreasing carbon emissions comes at a cost that customers ultimately pay. Likewise, keeping costs down and keeping the lights on at present still requires burning fossil fuel.

Competition, a key driver for digitalization, is seeping into regulated markets. However, it is not the only driver. Modernizing a utility's business capabilities will be necessary to quickly add new products that best deliver customer outcomes, as well as drive the most value.

The energy transition creates new, competitive business models

Decarbonization means a rapid shift to both gridscale and distributed renewable generation, the electrification of transport systems, and regulators enforcing energy efficiency programs.

A consequence of decarbonization is the deployment of millions of distributed energy resources (DERs) which present both opportunities and logistical challenges. Many new DER-based business models are being built around more complex customer requirements, like community energy programs, virtual power plants, microgrids, EV infrastructure, vehicle-to-grid, tiles-to-tires, in-home energy management, and transactive energy.

Even in the world of regulated utilities, "competition" is coming from within the grid. Utilities can either

choose to perceive this as a threat, or welcome it as an opportunity to be a part of the customer journey in an era of distributed generation.

Of course, competition is not the only driver to improve customer experience. Energy markets are increasingly digitalized, and the way customers interact with energy consumption is increasingly digital. If a utility lacks the infrastructure to serve customers in a digital future, it runs a high risk of failing to meet customer expectations. Without necessary investment in digital infrastructure, utilities miss out on all the efficiency savings that a modern digital experience can bring to an operation.





Digital readiness success factors, both technical and human

Digital readiness allows new entrants to be first to market. They are able to understand their customers' changing needs and quickly innovate to create new products and services.

A digital backbone that enables strategic agility is fundamental to success, but does not guarantee it. Building a state-of-the-art technology infrastructure isn't enough on its own. The agility that infrastructure creates should be used for competitive advantage. Disruptors are typically first to market with new products and services. Simply upgrading technology infrastructure does not mean that any organization can be a first mover. Successful first movers focus as much on the human side of innovation as they do on the technology.

Technical debt slows reaction time

While first movers are focused on rapid deployment of new business models, incumbents are typically large, complex organizations with no clear idea how to simplify. Incumbents tend to make incremental changes to their existing infrastructure, and only do so when infrastructure no longer supports core business objectives. This leads to a large technical debt, where making short-term shortcuts results in a much greater requirement for change in the future. Progress is slow. There are many barriers to bringing new products and services to market, and entrepreneurship is deprioritized in favor of business-as-usual activities.



Many utilities will at least partially recognize themselves in this description. After all, a conservative approach to business change has served the industry well for decades. But as we have discussed, energy markets are changing. The inexorable transition to renewables necessitates digital transformation. Being digital-ready is not an optional extra for utilities. It allows an organization to be customer-centric, to focus on specific business outcomes, and to adopt an entrepreneurial, innovative mindset.

Don't let old business practices hinder your digital transformation

There is a further risk to focusing on technology without adopting new mindsets: without a new business outcomes-focused culture, new technology will be managed with old approaches. Many utilities either have or have had a highly customized billing system. Think of each customization as an addition to the company's technical debt, which tends to be repaid in a huge system overhaul. At this point, many utilities have made the mistake of customizing the new system.

The process becomes more of an exercise in shifting technical debt from one system to another than a strategic transformation to a more agile enterprise. Clearly no one plans for this to happen; it is an unintended consequence. The reason it does occur is that the organization is too focused on technological change, and less on creating a new business culture.

Focusing on digital readiness is key to a successful digital transformation, and that is because digital readiness empowers the culture of an organization to change as much as it does its technology.





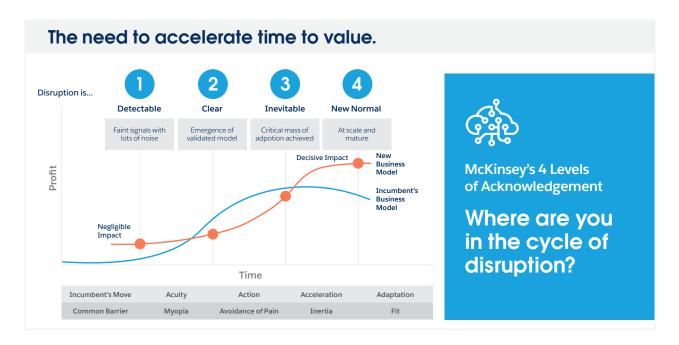
Digital readiness success factors, both technical and human (continued)

Corporate culture and leadership enable customer centricity

bringing new products and services to market that meet these needs. This requires a pervasive and enterprise-wide innovation mindset. This type of culture can only be sustained if it is engendered by direct executive involvement, a strong working relationship between business groups and IT, and a

close alignment of business models with long-term technology strategy.

Successful disruptors typically have a leadership team that creates an innovative culture and reduces organizational complexity. It is only with this innovative culture that baked-in digital readiness can accelerate time to value.



Market disruption needs a new way of thinking

This new mindset is vital as markets undergoing disruption follow different rules. When the rules of the game change, so must corporate thinking. One of the key factors that changes is the amount of time available to react to disruptive forces. Complacency can pose an existential threat to incumbents, who will often wait to react to new market forces only when they are forced to. But a huge risk is incumbents' belief that they have more time to react than is the case.

Utilities cannot afford to be complacent. Transport decarbonization is one of many disruptive forces

facing utilities. While EVs present a once-in-ageneration opportunity for load growth, they also pose threats as they require huge upfront investment in both physical and digital infrastructure.

If the speed of EV and rapid charger adoption exceeds a utility's preparation, ease of charging for customers could become an issue. Minor, infrequent inconveniences may be tolerated, but customers will not wait for their utilities to play catch-up. The biggest threat utilities face is customers shifting to self-generation through rooftop solar and storage systems. Rather than present a new revenue opportunity, EVs could cause utilities to lose customers.





Making way for agile innovation

First mover advantage is a new concept for most utilities, but they must realize that inaction is not an option. A regulated industry with no threat of competitive encroachment means there is no competitive upside to the cost of innovation. In the past, when cost-cutting-not customer centricitywas the primary driver for change, it was a far better strategy to learn from a competitor's mistakes and deploy new innovations once they had matured.

But this is no longer the case, and after decades of regulatory protection, the industry must evolve and develop creative ways to participate in the new, competitive, and customer-centric energy market.

Digitalization is utilities' countermove to new competitive forces

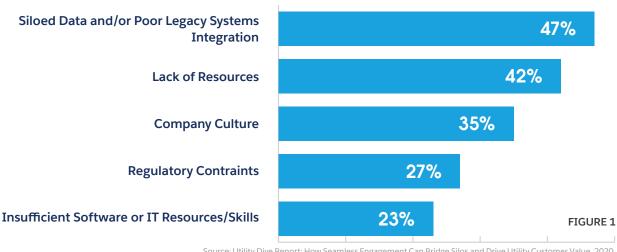
Competition is not the only driver for utilities to digitalize; digitalization, and the business agility it creates, helps utilities better address other market forces, particularly the Energy Trilemma. A digital-ready organization is more streamlined and efficient. By bringing down costs through efficiency improvements, incorporating renewables faster, and improving reliability, a utility can better manage the three opposing points of the trilemma.

Most importantly, digitalization enables utilities to focus their strategic planning around customers' needs. By better understanding their customer needs, and introducing agility to act on customer insights, utilities can rapidly develop new products and services.

Technology infrastructure is the biggest challenge to customer engagement

Figure 1 shows that many utilities cite technology infrastructure (47%), a lack of resources (42%), and company culture (35%) as the biggest challenges to customer engagement. All of these pieces are vital to digital transformation, but the data shows that a shift in thinking towards cultural focus will allow utilities to reach new levels of digital readiness and therefore have a more holistic and resilient modernization process.

CHALLENGES TO IMPROVING CUSTOMER ENGAGEMENT







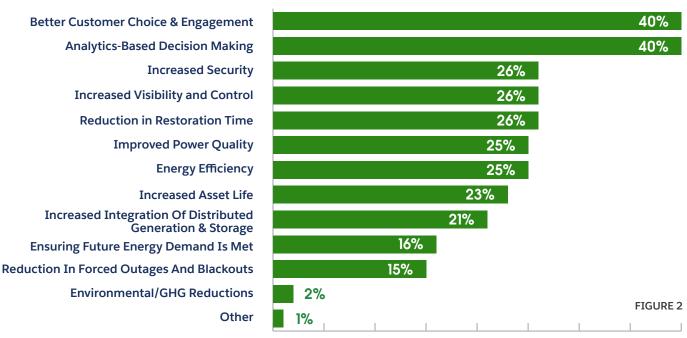


Digitalization is utilities' countermove to new competitive forces (continued)

Utilities recognize the importance of digital readiness to customer engagement

Figure 2, from a Zpryme survey on digital transformation, shows that the primary benefit of digital transformation is better customer choice and engagement (40%). Enterprise data can be used to create customized solutions that offer customers more control over their energy consumption, provide insight into how to create a more streamlined customer experience, improve the reliability of power supplies, and cut costs through predictive and prescriptive maintenance programs.

TOP BENEFITS EXPECTED FROM DIGITALIZATION



Source: Zpryme report: Building the 21st Century Digital Grid

Customer expectations drive utility digital transformation

Given that most utilities cite tech infrastructure as the biggest barrier to customer engagement, and that customer engagement benefits the most from digital transformation, it should come as no surprise that many more utilities rank customer expectations as a driver for digital transformation than any other factor.





Digitalization is utilities' countermove to new competitive forces (continued)

KEY DRIVERS OF UTILITY MODERNIZATION EFFORTS



Source: Zpryme report: Building the 21st Century Digital Grid

Moving toward digital transformation



Since the industry recognizes the importance of customer centricity, as well as the need to undergo digital transformation to improve customer engagement, it is important to note that the industry as a whole is not well advanced in making these changes. While some steps are being taken, only a small number of utilities appear to be making the enterprise-wide strategic changes required to achieve Amazon-like customer centricity.

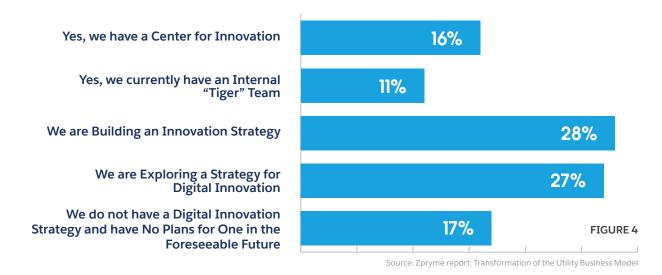
In a recent study, Zpryme asked utilities about the status of their digital innovation and transformation strategies (Figure 4). While only 17% of respondents stated that they have no plans for a digital strategy, 28%, which is higher but less than ideal, are building one. An additional 27% are exploring their strategic options, and 16% already have a center for innovation. The data shows that over half of utilities are moving in the right direction on this, though it leaves significant room for improvement.





Moving toward digital transformation (continued)

STATUS OF INTERNAL DIGITAL INNOVATION AND BUSINESS TRANSFORMATION



Digital investments should be less piecemeal

The kind of slow, incremental change that accrues technical debt is clearly demonstrated in Figure 5, where utilities comment on how far advanced their transformations are in many different areas. Consider that none of the most common responses, investments in social media monitoring, customer experience centers, energy efficiency programs (many of which will be mandated by a regulator), and investments into customer information systems, indicate a long-term, enterprise-wide strategic shift to digital readiness. Rather, they are signs of companies making incremental changes to existing infrastructure, running the risk of accruing significant technical debt.

Indeed, respondents who reported strategic changes, such as the launch of an innovation center, or hiring a

chief customer or innovation officer, were much fewer in number. The biggest takeaway from this chart is that a few utilities are demonstrating greater digital readiness than most of their peers and can lead the way with more proactive investment strategies and company culture.

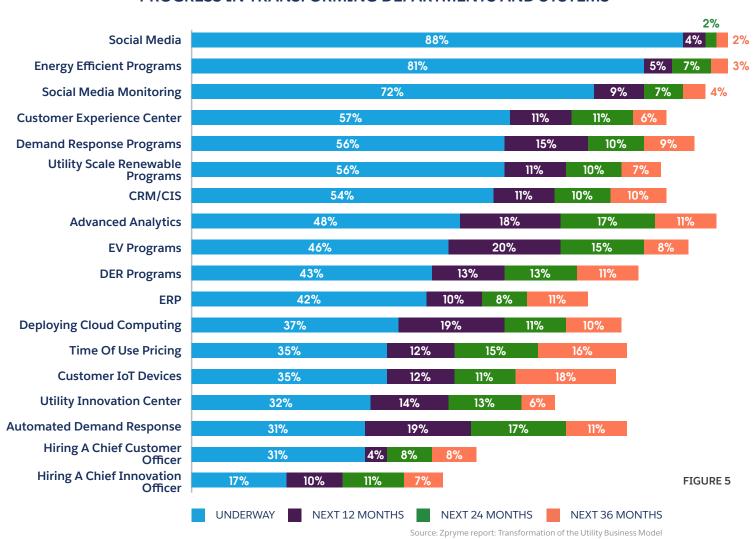






Digital investments should be less piecemeal (continued)

PROGRESS IN TRANSFORMING DEPARTMENTS AND SYSTEMS



Transformation project funding is a key issue

Unsurprisingly, the top challenge holding back utility transformation is striking a balance in the Energy Trilemma (61%). Availability of finance, revenue models, and working with regulators pose modernization issues for utilities as well (Figure 6).





Transformation project funding is a key issue (continued)

TOP UTILITY MODERNIZATION CHALLENGES



While most utilities cite similar barriers to transformation, no two utilities are the same. There are widely diverse approaches to energy policy and regulations, size and type of service territory, age and type of generation and network infrastructure, technology infrastructure, data governance, executive mindset, corporate culture, and age of workforce. All of these factors can make enterprise-wide transformation difficult, driving utility executives to choose alternative, less ambitious modernization plans.



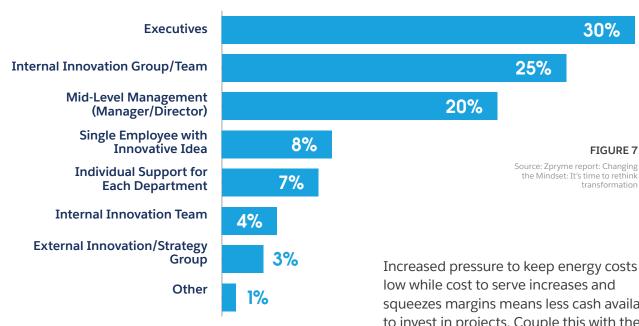
Our research found that at utilities today, innovation is happening starting at the leadership level (Figure 7), but many changes happen in silos (Figure 8). Utilities should reassess their decision-making and strategizing processes to improve their agility and have more success in their modernization efforts.





Transformation project funding is a key issue (continued)

AT WHICH LEVEL WITHIN UTILITIES IS INNOVATION INITIATED?



WHO WITHIN UTILITIES CONTROLS AND MONITORS IMPLEMENTATION OF NEW PROCESSES AND TECHNOLOGIES?

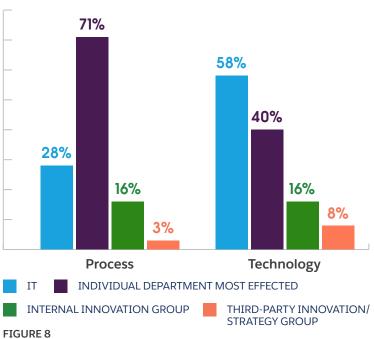


FIGURE 8
Source: Zpryme report: Changing the Mindset: It's time to rethink transformation

Increased pressure to keep energy costs squeezes margins means less cash available to invest in projects. Couple this with the age-old problem of demonstrating return on investment, and it is increasingly hard to gain regulatory approval for rate increases to fund enterprise-wide transformation projects. Smaller-scale projects are more easily understood, address a defined set of issues with a quantifiable return on investment, and cause less disruption to business as usual, making them easier to approve and deliver. It is no surprise that the path of least resistance frequently seems like a better choice than a much harder, more expensive route.

However, the more utilities and regulators use a stopgap approach to infrastructure problems, the more technical debt they accrue. By getting ahead now and beginning the transformation process and cultural shifts that will allow for more deft tech investment, utilities will set themselves up for greater agility and proactive innovation that will not accumulate technical debt.





Assess your organization's digital readiness objectively

In a way, the biggest risk utilities face is overestimating their digital readiness. The greater the disconnect between perception and reality, the more significant the risk. Understanding your organization's current digital readiness is vital in order to accelerate its transformation. Once an organization has a pragmatic view of its strengths and weaknesses, it can manage blind spots while baking digital readiness, simplicity, agility, and value creation into its corporate strategy.

Utilities can benchmark their digital readiness by assessing how advanced they are in embedding the key characteristics previously mentioned: technology infrastructure, culture, executive leadership, organizational structure, and program leadership.

Use the digital readiness framework to benchmark your progress

The digital readiness framework defines three distinct models, based on the existing technology environment of utilities. The second and third are the most favorable. It is important to note that an organization can be at various stages in the model and still be successful. After all, this is a journey, and different organizations will invest in different areas depending on their specific needs.



FIGURE 9

Source: Energy Central Webinar: Frank Palase on Utility Digital Readiness





Creating the customer-centric utility

A greenfield thinking approach to creating digital customer-centric practices can help a utility formulate its long-term strategic vision. Technology infrastructure is constantly evolving to deal with the changing dynamics of their markets. Put another way, their digital transformation projects are not single programs to be completed. Digital transformation strategy is focused on long-term evolution.

We see our customers as invited guests to a party, and we are the hosts. It's our job every day to make every important aspect of the customer experience a little bit better.

Jeff Bezos, Founder & CEO of Amazon.

Amazon has gained a deep understanding of its customers by employing a technology infrastructure designed to collect as much information about the customer as possible and innovating to improve customer experience. It takes that understanding to create new processes to give customers what they want. When Amazon expanded its product range beyond books and created its marketplace offering, it had to compete against market leader

eBay. It displaced eBay by improving the customer experience. Introducing customer product reviews gave customers more information about a product before deciding on a purchase. Later, the company went a step further and introduced same-day delivery. Amazon achieved success in this offering through huge investments in its own logistics operations, an area in which other retailers were unable to compete.

New practices for a customer-centric mindset

Customer centricity is not a throwaway phrase. A utility is not customer-centric because it has a new customer information system (CIS), answers customer complaints more quickly than its peers, has fewer outages, or ranks in the upper quartile of JD Power surveys. A customer-centric utility must be supported by a technology infrastructure that not only provides deep customer insights, it also helps understand customers' social and emotional needs beyond simple product requirements. Each new business process should bring the business closer to the customer, improve understanding, and help anticipate changing customer needs.







New practices for a customer-centric mindset (continued)



A customer-centric utility focuses on customer outcomes, not simple products and services. The ultimate goal is that customers can come to utilities for trusted advice on any aspect of energy consumption that touches any part of their lives.

The old customer management mindset manages each customer interaction as independent transactions, resulting in a disjointed experience. Over the past decade, customer experience has evolved. Disruptors like Amazon, Netflix, Uber and Apple have all adopted customer centricity. A decade later, customers are used to these companies managing the experience around them and expect others to do the same.

COVID-19 is accelerating enterprises toward speed, simplicity, and personalized experiences, all of which are centered around the customer. Many were already on this digital journey before COVID-19, but the crisis enabled them to boldly disrupt traditional bureaucracy and implement change faster than previously thought possible.

The energy and utilities industry must also create a customer-centric experience to improve the interactions of the customer and the employees who serve the customer. Utilities must do much more than just process single transactions. Services must be built around the customer context: the pressures they face, COVID-19, bill arrears, busy lives, new ways of working, all the other commercial interactions that customers must manage, and the different channels and interaction points that customers use for their different providers. Every staff member whose role directly impacts the customer, from

the call center agent to the meter engineer, must be equipped to deliver a seamless experience.

Remember that having the right mindset is critical to achieving customer centricity. Depending on corporate culture, your enterprise mindset can either hold you back or propel you forward. If you have the right mindset, you must also deploy customercentric business practices that will unite employees, departments, and partners to solve customer needs and create that seamless experience.



What are these business practices?

Make customer-centric decisions

They start with how your business makes decisions about customers. Choose to focus on customer needs, treating each interaction not as isolated, impersonal, and transactional, but as an opportunity to build a personalized experience, recalling key details about customers that will make them feel valued. Utilities must organize customer service around customer profiles, which will provide the context for the energy services each requires. A detailed profile needs detailed information from across the business, and this is why uniting employees and departments is so critical: you cannot create detailed profiles of your customers with data that is stuck in silos.

Establish customer-centric business processes

Once you have the insights from data, you need the right infrastructure to act upon them. If your infrastructure is designed around processing isolated transactions, it is unlikely to support your new business model. Delivering more tailored services relies on streamlined customer touchpoints, reducing the number of steps in customer processes, or even hiding certain processes from the customer to ease their experience.

Organize your business to best serve the customer

To create one customer-focused team, from across the utility, leaders must better empower their employees. Employees need the right training to understand how to better serve customers, as well as tools to collaborate and share information.

Create a digital-first utility

A digital operating model requires IT to be aligned with business needs. For many organizations, IT is in direct conflict with the rest of the business. That model must change to a strategic plan that helps align new business and technological capabilities, with a focus on the most important outcomes. This plan requires enterprisewide data governance to create a single source of truth that supports customer-centric decision-making.

To maintain the role of trusted advisor, utilities must understand the outcomes that customers need both now and into the future, and then design products and services to create these outcomes. While this of course depends upon the reliable supply of inexpensive, sustainable power, it has become increasingly important to understand not only how different customers consume energy and interact with energy systems, but how they connect emotionally to different types of energy and energy-consuming devices. This is particularly the case if increasing numbers of customers move away from grid-sourced power supply.

Once utilities gain these deeper insights, they can design the products and services that their customers really want. Digital readiness is an important aspect that companies must address to adapt this new mindset.



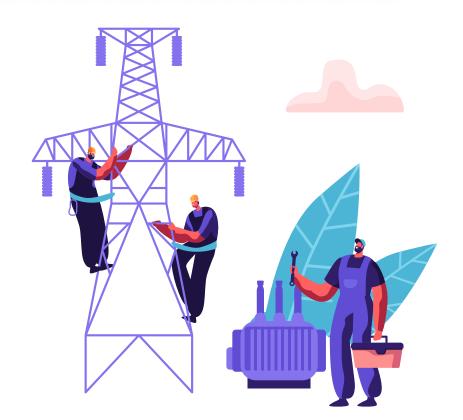


How to optimize digital readiness

Culture

Changing corporate culture is difficult and never perfect. It requires constant appraisal. While no single company will ever get this 100% correct in practice, there are some common goals to strive for:

- → Focus on business outcomes and your long-term strategy.
- Innovation is best done when all employees are encouraged to participate, instead of just leadership, so create a collaborative culture where your staff are encouraged to come forward with ideas and obstacles to innovation are removed.
- Breed trust in your organization, where failure is not punished, but seen as a necessary consequence of innovation.



- → Fail quickly but learn from previous mistakes.
- → Ensure that the right people in your firm have the right skills, as well as access to the technology that supports them in their jobs.
- → Ensure that innovation programs have strong governance.

Management

It cannot be stressed enough how important it is for cultural change to be driven by an organization's leaders. Executive involvement is a prerequisite of success. The C-suite must be at the forefront defining the future vision for the company, describing how it must change, sharing the vision with the business, leading corporate communications and training programs, and arbitrating disputes. The executive provides the strategic context of the digital transformation, so that when staff make choices, they are done in the context of the wider vision.

A digital transformation must change culture across an entire business. All parts of the utility business ultimately reach the customer; thus, all parts of the business must be involved. No one outside of the executive board can affect change across all departments. Without executive leadership, digital transformation becomes optional, and is more easily resisted by skeptics.





How to optimize digital readiness (continued)

Program Leadership

A successful digital transformation needs to strike a balance between IT and the business. If one side has too much influence, projects are doomed to fail. some opt for a joint leadership model, but this can lead to suboptimal results for the business.

Digital transformation is not an IT project, and neither should it be IT-led. A business-led project with IT influence strikes the best balance between business requirements and project governance. Of course, while IT departments are front and center of any transformation project, they must not lead such projects. IT's role is to create the digital platform on which a customer-centric utility can be built. The leadership strategy of a digital transformation program must strike a balance of power between IT and business units.

Only the business can define its needs, and only IT can define what is viable. It is critical to redefine the relationship between IT and the business in order to ensure success. Too much weight toward the business can result in a long list of unachievable requirements, while too much weight toward IT may cause the long-term vision to be lost.

It is here that cultural change is so important. A common leadership model must be cultivated that empowers and trusts all employees to collaborate to drive innovation and change.

Technology Strategy

Given that no two utilities are the same, each technology strategy will be different and is best defined in a series of workshops. However, it is vital to have an overarching technology strategy that connects the dots across the business. Responsibility for technology strategy must be centralized and not passed into departmental silos. A diffuse approach to technology strategy will result in new technology silos, which is a less than ideal approach to customer centricity. Essentially, it's an exercise in increasing your organization's technical debt.

Designing and building your new technology infrastructure is a difficult task, but must be done well, or again, you will accrue technical debt in your new systems. How you design your future architecture relies heavily on what is in place today. Some utilities opt for a greenfield strategy, where new infrastructure replaces the old, while many others will adopt a brownfield approach, where existing infrastructure is adapted to meet future needs.

Organizational Structure

Organizational structure governs the allocation of resources in a digital transformation and can have a huge impact on project success. Resourcing projects can prove problematic if a transformation project is buried in a legacy group.

Most organizations will create a team dedicated to delivering the digital transformation. The team is the seed that establishes the new culture, program leadership, and executive engagement that drives the company toward continuous improvement.

There are other approaches that some have adopted as well. For example, a bold move is to create a separate company that competes with the old organization. This is typically only done in a disruptive marketplace. A utility could, for example, set up a company that sells rooftop solar and storage systems to customers, in direct competition with the supply side of the business. Resourcing is a key issue here: resource allocation is driven by where the profits are made. Define the new market and invest appropriately, so that your utility can take advantage of the new initiative.





Conclusion

Agile innovation is the key to digitalization and positive market disruption for utilities seeking to stay current. Despite the challenges that infrastructure presents, rising customer expectations are shaping digital transformation efforts, giving utilities the ability to become more competitive and overcome the hurdles of modernization. Project funding, however, needs to be sorted out in order to finance new revenue models and innovative implementations. Some of these challenges can be overcome by digital readiness assessments to strategically understand how far along a utility is in this process, as well as what further steps they need to take toward an ultimately successful digital transformation. Beyond assessments and appropriate planning, culture plays a massive role. Integrating entrepreneurial mindsets into legacy processes and departments can kickstart the shift in a utility's cultural mindset. In order to do so successfully, organizational shifts may also need to occur to better optimize and govern new initiatives across the organization.

For more information and resources on Utility Digital Transformation visit the <u>Salesforce Energy and</u> Utilities Resource Center.







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