

Customer Success Keynote: A Path to Success with Salesforce

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Speakers:

Speaker A - 17.48%

Speaker B - 9.25%

Speaker C - 12.39%

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Speaker F - 13.11%

Speaker G - 10.53%

Speaker H - 7.2%

Speaker I - 15.81%

Speaker J - 2.39%

Notes:

- Welcome to the last keynote of Dreamforce 2024. We've even got an incredible giveaway at the end that is going to make Oprah proud. Unfortunately, I can't share any stock market tips or World cup results. But what I can do is make sure this session is worth your while.

- Bombardier has been working in the AI sphere in different parts of our business for a few years. Salesforce professional services came in to help Bombardier scale its AI program. How did you get your leadership team over the hurdle there?

- Irina Castania: How did you pick a way, how did you start to set scope, decide where you'd start? She says Bombardier decided to go for a very user centric and agile approach. What a great story of AI, of data, of humans, trusted advisors coming together to create these business outcomes.

- Salesforce's first dream force was at the Weston St. Francis in 2014. Over 9000 consulting partners, 7500 isvs and they're all here to help you, our customers, be successful. Kiersten Rhodes from Deloitte to share the partnership story.

- Salesforce is our next gen marketing automation project. The three biggest challenges you provided us was one, you wanted to make access to that data faster. And then, you asked us to think about helping you create the data to be smarter. Now we get to go take that to market.

- Thank you all for being here. We will see you in the future at Dreamforce next year. Thank you, everybody.

Speaker A

00:00:04

Welcome to the last keynote of Dreamforce 2024. We made it. All right. Now, I just rolled in from the future and you are not going to believe it. It is incredible. Unfortunately, I can't share any stock market tips or World cup results. Even with all of our forward looking statements, the lawyers said no. And I can't help any of you travel through time directly to the end of this keynote either. But what I can do is make sure this session is worth your while. We've even got an incredible giveaway at the end that is going to make Oprah proud.

Speaker B

00:00:43

Huh?

Speaker A

00:00:44

Now, our job today is to help all of you get to the future. And when I say that, what I mean is that we want to make sure that you have clear pathways for greater success. We're going to talk about four pathways for greater success here today. And our goal for this

session is to make sure that each and every one of you walks out of here with one very clear next step. But before I get to those pathways, I want to start with a. Ah, thank you. Thank you for your trust and partnership over the last year. Thank you for inspiring us to innovate. And thank you even more by inspiring us with your success. Thank you. All right, we can give it up for that. Now, let's get back to the future. You've heard a lot about the future this week, your future and the future in general. But when I've been talking to customers, what they're telling me is, Jim, I want to get to the future, but I also need to get more value from my existing investments from Salesforce. I need to do that so I can get to the future. So in this session, we're going to talk about four pathways for more success. Pathway number one is insights. The customer success score gives you a blueprint for more success. Pathway number two is Agent force. Anybody heard about Agent force this week? All right, well, in this session we are going to pop the hood and show you exactly how we are using Agent force ourselves. Pathway number three is experts. You do not have to do this alone. We have experts around the globe in our ecosystem that are ready to help you get to the future. And pathway number four is learning. In this AI era, now more than ever, we all have to be on a learning journey, myself included. And Leah is here. And later in the session, she's going to share all the latest and greatest with Trailhead. Sound like a plan? All right, so let's get into pathway number one insights. When I talk to customers, I hear a lot that they want to get more value from Salesforce. They want to reduce tech debt, improve performance and take advantage of those features they maybe didn't know were there. Well, this is exactly why we built the customer success score. And when we started the customer success score a couple years ago, we were very deliberate. We wanted to make sure we were measuring your success, the success of our customers, and not our own success. We've seen others in the industry make the mistake of measuring things like revenue retention and growth and calling that customer success. But the reality is those are measures of a company's success. They're still important, but they are not measures of customer success. So when we looked across our company, we realized we had a lot of data. We had all kinds of signal on things like telemetry, adoption data. We had data about events and what people were doing at Dreamforce, and we had data about what our customers were doing on Trailhead. And thank goodness for Data Cloud. This could not happen without Data Cloud. We took all those signals and we put them in Data Cloud and we rolled them all together to one composite score of true customer success. And we rolled it out for our customers and our teams. And later this year we're going to pilot it with our consulting partners so together we can all drive more customer success across the ecosystem. And there's countless stories of customers being wildly successful with the score. I want to share the story of Trinet. Trinet's a customer that I am personally involved with, and nine months ago they were not in a great spot. They had performance problems, they were having outages. The performance of their Salesforce implementation was blocking their success. They couldn't get to the future for where they were, so they started using the customer success score and in just three months they turned it all around. Just incredible results. They improved performance, they improved stability. You can see the results up here. 90% error reduction. I know there's

some admins and developers in the audience who wouldn't want these results. This is incredible results, all made possible by the customer's success score. Now, I said there's countless examples of customers having great success with the score. So I want to bring my colleague Usman to the stage. Usman's going to share in detail what the customer success score looks like and share how he is using it to drive incredible success with his accounts. Usman, over to you.

Speaker B

00:05:32

All right, I'm, thank you, Jim, and thank you for enlightening us about the future. The future seems very impressive and what's equally impressive are the results that our customers are getting by leveraging the customer success score. The trends that Jim just talked about are exactly what we're seeing with customers across all industries. I lead the customer success teams for our manufacturing and energy businesses, and with the help of my demo team, Emily and Zach. Hey guys, we will show you. Yes, it's an awesome demo team. We will show you how you can also leverage the customer success score to drive incredible business results. So Emily, Zach, let's jump into the demo. All right, so as soon as you log into your customer success score, you are able to view the overall score for your organization, which is measured on a scale of zero to 100. The higher the score, the higher your success. It really is that simple. The customer success score is comprised of more than 300 data signals that are broken down into three categories of product adoption, your team's expertise, and the technical health of your salesforce implementation. And these categories are also measured on a hundred point scale. So let's jump into the technical health portion of the score where you can see all the different technical signals coming in, for example, any errors that might be happening. And I'm going to focus on one of the technical signals called roloc timeout errors, which we see a lot of customers struggling with all the time. Recently, one of my manufacturing customers was experiencing more than 800,000 roloc errors every two weeks. Now, that happens when you have too many concurrent users and systems accessing and updating the records at the same time. Salesforce, for the purposes of data integrity, will allow one user to update the record while the others have to wait up to 10 seconds to retry. And with 800,000 errors taking place, the wait time was becoming a big bottleneck. The users were experiencing delays while trying to update their records, and in some cases, the data was just missing. That's not good. Leveraging, proactive monitoring, and AI driven recommendations from the customer success score, we were able to help them clean up their user permissions, their tech debt, and incorporate consistent error reporting that resulted in a phenomenal 95% decrease in the rollock errors. But you know, it's not just about the technical improvements alone. The question we should all be asking is, what does that mean to my business? And in this case, this 95% reduction in the roloc errors translated to 21,000 hours given back to the sales and service users. That is just incredible. Yes. Like many of you in the room today, one of my big energy customers is going through a massive business transformation. They have multiple implementations that required them to

transfer high volumes of data in Salesforce. Think 300 400 million records at a time to make sure that they are ready for this transformation and their team has the right expertise. My team started looking into the expertise section of the score and what we found out is that they were not leveraging key event management for high volume events, which is purpose built for scenarios like these. As we started talking to their IT team, we found out that these data loads were taking a long time and in many cases they were failing, causing a lot of frustration with the IT team. I would be frustrated if I was running that IT team because that slows down my team's progress. The good news is that with customer success scores, AI driven recommendations, we were able to bring in key event management best practices and recommendations. And once applied, they were able to reduce their data load time by 66%, bringing it down from three days to less than a day. And that has allowed them to roll out, uh, new users and new innovation much, much faster. All right, so as I look at these results, 21,000 hours given back to the sales and service users. 66% reduction in data load time, 95% reduction in rollock errors. These are actual business results that customers in my business have been able to achieve in a matter of months as they've started leveraging proactive, AI driven recommendations from the customer success score. And this is how you maximize the value from your salesforce investment. In the end, please remember, you cannot improve what you cannot measure. And the customer success score is the ultimate tool and your best friend to help you measure your sales for success. Thank you for listening. Back to your Jim.

Speaker A

00:10:11

Awesome job, Usman. Way to go. All right, there is no doubt that the customer success score is a game changer. But do you know what else is a game changer? Pathway number two, Agent Force. Like all of you, a year ago, we started experimenting with Genai and chat GPT, and we soon realized that there's a big, big difference between those experiments and rolling out Genai across a, uh, global operation. And then three months ago, something really amazing happened. Agent Force. It changed everything and it gave us a pathway to do what we wanted to roll out Genai at scale across our global operation. I want to bring my colleague Sanjeev to the stage. Sanjeev runs, uh, our global support operation. He's the guy, he runs it for all the clouds around the globe. And I want you to hear about his experience as a customer. Sanjeev is a customer just like all of you. The reason it's important for all of you to hear about his experience as a customer is because Sanjeev was the first customer of agent force. Sanjiv, over to you.

Speaker C

00:11:22

Thank you, Jim. Leaders across every organization are, uh, looking at tangible and meaningful AI use cases to solve two things, reduce costs, uh, through automation and exceed their customer expectations, which continues to rise. We at Salesforce are no different. My team handles over 7000 cases a day, over 2 million annually, and we serve over 200,000 customers and partners globally this week. I know we all have heard a lot

about Agent force, but one of the perks that I get running customer support at Salesforce is my access to the product organization. We have been working, as Jim mentioned, for the last few months and today I am proud to share with you a few AI use cases that we have deployed using agent force. Let's take a look. Here's our help site. And we have a customer, Jasmine. Like most of us, Jasmine doesn't wake up in the morning thinking, I need to talk to a support agent. She prefers self service. Here she is looking for information on how to create custom fields. She has access to all the knowledge, articles, documentation and all the content that we surface for her. But she notices an agent for service agent icon at the bottom right. She clicks on it and the service agent gets into action. It greets her with a personalized message, congratulates her on becoming a ranger, and thanks her for being a premier customer. All this personalization is powered by data cloud. The service agent provides step by step instructions on how she can create a custom field. Jasmine can follow along, come back with additional questions, and engage with the service agent just like she would with any human. Once she has all the answers, she can even rate her overall experience with the service agent. Now that's agent four's service agent, allowing us to engage with our customers, which is all of you in a whole new way. We also heard this week that the future is not AI alone. It's AI and humans working together, driving customer success. That's why we spend an incredible amount of time, and I repeat, a an incredible amount of time making sure the handoff between the autonomous or digital service agent and the human support agent is seamless in the future. Our service agent can not only create that custom field for Jasmine if she would like, but it can proactively bring a human into the conversation and connect with Jasmine. Now let's assume that Jasmine has some additional questions, but this time she wants to engage with a human. Here's our support console. And we have our customer contact, Jasmine. And the case has been assigned to one of my team members, Priya Patel. Using omni routing I will draw your attention to the top left hand side. Before Priya gets in touch with Jasmine, she wants a little bit more additional information. Here she can find the expertise level of Jasmine. She can find out how many badges she has, how many trailhead certifications she got. All this is coming from trailhead Usman touched upon customer success score. Here you can see the health score of Jasmine's Salesforce implementation. And finally, Priya wants to know all the past cases that Jasmine has opened, but more importantly, make sure there are no open severity one urgent cases that she should be mindful of before she makes the call to Jasmine. All this is powered by data cloud. It is at the center of a strategy allowing us to connect to all these various data sources, unlock that, uh, trap data and create that unified contact profile like you see for Jasmine here across every industry, whether you are in b two B or b two c, whether you are a customer or consumer, one thing humans like personalized service. That's what data cloud allows us to do, and it has helped my team make every interaction smarter, faster and more meaningful. Now let's take a look on all the activities that have happened on this case. Here's the chat transcript between the service agent and Jasmine. Looks like Jasmine has come back with some additional questions. Priya, the case owner, has started a swarming session using slack. She brought in a mulesoft expert and together they worked on this

issue at the end of it with a click of a button from slack. That forming has been summarized on this case. And finally, Priya has sent resolution steps to Jasmine. Now, support agents across every industry do two things, troubleshoot and resolve the issue, obviously, but they also spend a lot of time documenting and summarizing the case using PromptBuilder, a feature of agent force. We have automated it so Priya can go click on case summary. And based on all the activity on this case, the prompt builder will summarize with the problem description issue and the resolution steps that Priya has taken on this case. A well documented summary or documentation has a lot of benefits in service industry. You can easily convert it into a knowledge article. If you run 24 by seven operations like we do, a new agent can easily get up to speed reading this summary. And no matter what your role in the company is, if you have to make a call to the customer, you may want to know there's no severity one going on, right? So you can do that using this case summary, but it's not limited to case. We also have account summary. Now think about it. I mentioned to you at the beginning. We handle 7000 cases a day and every case can benefit with a good summary or documentation. Think about the time saving and the efficiency that we have brought to my team with a click of a button using promptbuilder. What I have shown you today are not just product demos. These are actual features of agent force that we have deployed for in our team, for our operations to better serve all of you. Our agent force activators are available and in standby so they can help you with your AI strategy. To share more how you can engage with those experts, I'll, uh, pass it to my colleague Mark Wakelin, head of professional services. Please give him a big hand.

Speaker D

00:18:03

All right, thank you, Sanjeev. Incredible. Now, we're not just building these agents for ourselves, we're building these agents for our customers using this incredible technology. And we've realized this week that actually technology is really only part of the equation. If we're going to make the leap towards AI, we've got to think about the human part in that human pass AI formula. So fortunately, we have those humans, we have those experts here ready to help you. Now, depending on where you are in your journey, perhaps you're contemplating a new journey, perhaps you're course correcting an existing one, or perhaps you're just asking the question, hey, how do I get more value out of the stuff I've already got? Then we're here and we're ready to support you. We can help you build a roadmap to support your corporate strategy. We can help you with an AI and agent force led operating model. Maybe you want to stand up a prototype using our agent force activator program and, uh, in five weeks stand up a prototype in your own organization to prove the value. We're here to help you drive this. We help you combine the value of data of AI and humans to drive organizational change and long term business. Um, value. Now, it's my pleasure to be able to welcome one of our customers here. We're going to show you a video of a case study we've worked on recently with Bombardier. Now, Bombardier are, ah, the world's leading manufacturer of business jets. And for those individuals that are lucky enough to fly around in their own planes, they are curating some incredible

customer experiences. So let's go ahead and roll the video.

Speaker E

00:20:00

Real time data availability is absolutely critical. Bombardier's vision was to activate that data with data cloud, empowering sales directors with AI capability so they could provide wide glass service to their customers. And it is really critical to have the right partner to take you on that journey. Salesforce professional services is very well positioned to do just that.

Speaker F

00:20:29

Bombardier is the largest manufacturer of business jets in the world and we make the world's most beautiful, technically advanced aircraft.

Speaker G

00:20:36

Bombardier's customers span the gamut.

Speaker F

00:20:38

They're business leaders, large corporations, and they.

Speaker G

00:20:41

Expect our sales directors to be intimately knowledgeable of everything that's going on in their world.

Speaker F

00:20:46

Our salespeople are the most important asset. The data, uh, that gives this complete view of the customer is critical, but.

Speaker G

00:20:53

All of that data sits in different parts of the business and it requires someone going to each individual system.

Speaker F

00:20:59

We had thousands of leads, but no way of knowing when a customer was really ready to buy. We knew that AI was the solution to our problem.

Speaker G

00:21:09

AI is new and you kind of stop and think, well, who in the market's actually going to know how to work with this tool? We made the decision to work with Salesforce professional

services because that support system, that response rate created a lot more simplicity and ultimately it gave us a single source to connect with to lay.

Speaker E

00:21:29

Out that, uh, holistic experience. Professional services really took the time to understand Bombardier's needs and they saw those needs reflected in our architecture, in our design and our blueprint.

Speaker H

00:21:42

We're prepared for takeoff.

Speaker G

00:21:46

Bringing together the Salesforce platform and professional services is the differentiator for our organization.

Speaker F

00:21:52

The speed to qualify a lead is significantly faster than Form AI, uh, allows.

Speaker D

00:21:58

Our sales team to be more efficient.

Speaker F

00:22:00

And really augment what they do on a daily basis.

Speaker G

00:22:03

Agentforce is going to be that sales assistant which every salesperson person needs because.

Speaker E

00:22:09

Of our close partnership with our product organization that allow us to proactively build out those skills and, um, bring that expertise to our customers.

Speaker F

00:22:18

I truly believe the professional services team cares about the success of this project as much as we do.

Speaker E

00:22:25

Working with Bombardier team is one of the most rewarding experiences. I can't really tell when Bombardier team ends and Salesforce begins.

Speaker G **00:22:35**

Bringing together CRM, um, AI data and trust makes our sellers more efficient, creating a really comprehensive 360 degree view of our business and ultimately positions us as the world leader that I think every company strives to be.

Speaker D **00:22:51**

Awesome.

Speaker I **00:22:52**

All right.

Speaker D **00:22:57**

Thank you, Sandy Frank to Irina Gutmann, the leader of our global AI practice and welcoming to the stage global AI enablement leader from Bobadier. Please welcome folk Costanza. How are you?

Speaker G **00:23:11**

I'm great, thanks for having me.

Speaker D **00:23:12**

Good to see you. Now can we share our little moment that we had together during Dreamforce in front of 7000 people with that? Yes, I'm walking down third street the other day and, you know, we've met before to do a little rehearsal, uh, and we bump into each other and what are we standing underneath at that very moment?

Speaker G **00:23:32**

I'm going to make you say it.

Speaker D **00:23:34**

We are standing underneath a two story picture of foe, uh, and just absolutely gigantic on this building. We took a photograph and you tell everybody at home, you're like Rockstar. Cool. In San Francisco.

Speaker G **00:23:47**

My mom's proud.

Your mom's proud. Love it. All right, well, thank you so much for being here. Welcome. You've probably never seen yourself in so many large formats.

Speaker G

00:23:55

A few times, yeah, this is pretty big.

Speaker D

00:23:57

Let's get into the details of the story. We've got a lot of people sitting around the room here, been hearing all week about AI and agents force, and you're one of our pioneering customers. I think we want to try to share with the audience, if we can, some of the stories, some of the lessons learned. And I want to start, really by how did you get this program initiated and such a pioneering space? How did you get your leadership team, you know, even over the hurdle there? Tell us a little bit about that.

Speaker G

00:24:25

Yeah, it's a good question. So Bombardier has been working in the AI sphere in different parts of our business for a few years now, but on the sales side, we hadn't really gone there. Um, and our journey actually started right here at Dreamforce a year ago where we came and we started absorbing all the knowledge, all the information, seeing all the new products that were out there. And if we recall what last year was, we were just a few months into the chat GPT boom, right? There was excitement, there was energy, and it wasn't a question of if it was how, um, but as we faced it, of course there was preoccupations, right? It was how are we going to get there? How are we going to scale the mountain that is ai hdenite? Um, and we realized really quickly that we had to approach it with a lot of humility, right. We had to look at this challenge, um, and understand how we were going to get up there. And it really was looking for that guide, who was going to bring us along that process, who was going to make sure we were ready at the ground that was going to help us pace ourselves along the way, and that was going to help us with any kind of challenges or roadblocks we'd face. Um, and with that, it wasn't a question of just finding a service provider. It was a question of finding a service partner, right? Someone who really had our best vested interests at heart. And that's where Salesforce professional services came in. And in terms of our leadership, again, there was a lot of excitement, but like I said in the video, AI was new. AI was a little bit scary and the exercise was just simply about information. It was about listening to their questions and concerns. It was about bringing in the right experts and really making sure that we were addressing their concerns and mitigating the risks that could exist. But again, with the partnership, we felt like we were being given the right guidance to move forward in a way that we'd feel successful.

Speaker D

00:26:07

Fantastic. Thank you. So you just described it as a mountain. Yeah. And uh, there's lots of ways up mountains. How did you pick a way, how did you start to set scope, decide where you'd start? Tell us a little bit about that.

Speaker G

00:26:21

Yeah. So again, in partnership with professional services, we thought about it and ultimately we decided to go for a very user centric and agile approach. Um, so from a user centric perspective, we really wanted to make sure that we were analyzing the day to day pain points of our sellers, making m sure that we were allowing them to increase their efficiencies, decrease their swivel chair. And from an agile perspective, it was really important that we'd have the ability to pivot if priorities changed. Um, and again, AI is changing all the time, so making sure we could pivot if technologies changed. So it was really important to go forward with that. And where we decided to move forward and focus on was starting with a data foundation, making sure that we were bringing in the external and internal data sources that were critical to our business to really get that, um, starting point in order to enable us and then taking on things like lead prioritization and scoring, leveraging agents to better assist our sellers, um, next best action, all those types of amazing tools that would allow our sellers to be out there more and to be more human.

Speaker D

00:27:29

Absolutely incredible. There's a line in the video which really kind of touches my heart. And by the way, thank you so much for giving our professional services, the organization to be your partner in this journey. But, uh, there's a line in the video that really touches my heart where Irina says something like, you can't really tell where one team starts and the other team begins. Tell me a little bit about that dynamic and what it's meant to you and to the team at Bombardier.

Speaker G

00:27:54

It's been huge and I don't want to say it was unexpected. Again, we went for that partner, we went for that trust, we went for an organization you know, Bombardi has been working with Salesforce products for nearly 20 years. Um, and we always felt the trust and the security that came with it. But from day one we weren't treated like an account number. Right? From our account executives, the sales teams, the services teams, every person on our project has sat down, has listened. Some of them probably understand business aviation more than some people in business aviation at this point. But every conversation was one that you knew that they cared, you knew that they wanted to have the same success as we wanted and that we were going to achieve this together.

Speaker D

00:28:38

Incredible, fantastic. What a great story of AI, of data, of humans, trusted advisors, uh, coming together to create these business outcomes. Ladies and gentlemen, please join me in thanking foe Castania for joining us from Bombardier.

Speaker I

00:28:56

All right.

Speaker D

00:28:59

So some of you may be sitting out there thinking, hey, I could kind of use some help like that on my program. Well if you need some help, that's what we're here for. Our Salesforce CTos, our Salesforce chief technology officers work with many of our customers on their projects, on their programs as part of their internal center of excellence, really helping with the orchestration of program implementations and assuring architectural integrity in everything that we do. They work to help around performance and scalability challenges and work in lockstep with our product organisation to make sure we consistently bring you the latest insights and innovations to drive business value for your organizations. But make no mistake, we don't do this alone. Uh, in fact we do this as a part of an incredible collaborative ecosystem, our incredible network of partners. And I would like to introduce my colleague, my friend, my partner, president of our alliances and channel organization. Please welcome Mister Jim Steele.

Speaker H

00:30:04

Thank you Mark. Thank you Mark. You are absolutely right. We have the most amazing partner ecosystem, over 9000 consulting partners, 7500 isvs and they're all here to help you, our customers, be successful. We are so grateful to our partners and uh, our customers for being on this incredible journey with us. You know, it's hard to believe that uh, our first dream force was, this is our 22nd dream force. Our first dream force was at the Weston St. Francis in 2014 and three, and we only had a handful of customers and a handful of partners at that event and here we are. In fact, most of our customers and partners didn't really understand the whole cloud computing model at that point. They didn't necessarily believe in Salesforce and this cloud model, but there was one global consulting company that leaned in, that took that leap of faith and built their Salesforce practice. And that's Deloitte and that's why I'm so excited to invite up Kiersten Rhodes from Deloitte to share the partnership story. Kirsten, great to have you. I am m so happy to have Kirsten on this stage and for a couple reasons. One, we are actually really good friends. I've known you for I think 20 years now and I was two. You know, not only are ah, you a good friend, but we are a great partner of yours, great customer of yours. You're a customer of ours. We do so much together to go to market and to support all of our customers in this ecosystem. Let's start with Salesforce. As your client, you are the executive sponsor for Salesforce.

Yeah.

Speaker H

00:32:06

Share with the audience what you're doing for us around our next gen marketing automation project.

Speaker F

00:32:12

Well, first of all, we were thrilled to help you with that endeavor. Uh, look, everybody is looking to aggregate data in a way that is timely and certainly comprehensive in nature to create the right insights at the right time. And so we couldn't have done this without obviously implementing data cloud. Uh, but most importantly, there were some pretty significant efficiencies that you all wanted to achieve. One, you wanted two times the productivity efficiencies you also wanted to reduce. Swivel chair. Right. You've got a number of different data sources and we've had the opportunity to implement and integrate six data sources, both internal and external. But the three biggest challenges you provided us was one, you wanted to make access to that data faster. So think speed to lead. Right? Think real time marketing, real time alerts. You also asked us to think about how to create data that's more relevant, uh, more intuitive, more thoughtful as it relates to providing account and client insights as an example. And then finally, Jim, you asked us to think about helping you create the data to be smarter. Um, so think about how you are creating insights in a much more collaborative way for your, uh, sellers and your marketers. And what I'm so excited about is that not only have we created a story together, Salesforce on Salesforce, but now we get to go take that to market.

Speaker H

00:33:44

And I'm sure we weren't a, uh, demanding client at all.

Speaker F

00:33:47

Oh, no, not at all. Juan and Ariel are just gems to work with.

Speaker H

00:33:51

You're deploying our technology at our company. We have to be the best. And we chose, you do chose the best. Speaking of demanding customers, Deloitte is also a demanding customer of Salesforce.

Speaker F

00:34:03

Yes.

Speaker H

00:34:04

Tell us about how you're leveraging AI and our technology to really transform the whole client experience with Deloitte.

Speaker F

00:34:12

Yeah. So, Jim, our CEO, uh, came into place about 18 months ago, and he really challenged me to say, how do we modernize the way in which our partners and leaders are showing up in the marketplace with our clients? Uh, he also asked us to really think about how do we institutionalize this data about our clients. We, uh, all certainly know that a lot of that sits on our iPhones or our Excel spreadsheets on our laptops. And we really didn't have a thoughtful way in which to capture data at the individual level. We certainly had account data, client, uh, account data at the aggregate, but not a way to think about how would we track, how would we incent, and how do we make sure that we are building intimate relationships with our clients. And so I have to give a shout out to Mark and Christina and Mike Kennedy, uh, from professional services, who have been on this journey with us for about nine months now. And, uh, they have been incredible partners to collaborate with us to bring to life r 360. Of course, we've been dabbling with AI, uh, and of course, Einstein co pilot. But I can't wait to get my hands on agent force. The real game, uh, changer for us in this way, though, Jim, has been that now we can track lifetime value, uh, of a client. Um, so what that means is moving away from an account to an account. We actually can watch our clients move from company to company and understand what that lifetime value is to Deloitte. I'll give you one other stat, which is we have done, uh, some regression testing already with about 110 of our accounts. We now know that as a result of 360 and the early pilots, that if you attend five signature client experiences with Deloitte, you actually have a multiplier of four times that of, uh, a pipeline of any other client that we serve today.

Speaker H

00:36:10

Wow. Well, thanks for sharing that story. The collaboration between our two companies has been amazing. One of the things in my experience with Deloitte over the last 20 years, Deloitte is always one of the early adopters of new technology. You figure out a way to drive that new innovation to our clients with speed and value. And we've had a lot of announcements in the last few months leading up to Dreamforce, including, of course, Agent force. So you talk to clients all the time. You know the challenges that they're facing out there. How do you see Agent force and AI helping our clients solve their problems?

Speaker F

00:36:48

Um, well, Jim, you talked about the fact that we've known one another 20 years. I mean, I've been in the tech business for 35. Right. I actually believe this is one of the biggest game changers, uh, that we are going to see for quite some time. And I am thrilled about the capacity, uh, the uniqueness that Agent force is going to be able to, ah, provide us and our clients. Um, I was really, uh, privileged to meet with Patrick on Monday night before

the keynote. And so we've already started brainstorming, not only within our organization, what we can be doing with Agent force, but of course, bringing those case studies to life in the marketplace. And then I'll just say I have to give one additional, uh, uh, applause to Atlas. I mean, I think what you're doing as it relates to the reasoning around LLMs is going to be game changing.

Speaker H

00:37:39

Now, Kirsten, the last question I want to ask you about. So none of this comes to life, none of the projects that we talked about, none of the technology comes to life without people. And one of the things that we share in terms of values with Deloitte is people and talent and equality. So how do you see the workforce evolving? And in particular, how is Deloitte looking at really helping underserved, uh, communities?

Speaker F

00:38:08

Yeah, so, uh, near and dear to my heart, uh, I used to lead Dei for the firm. Um, and as you mentioned, certainly, uh, talent is the lifeblood of our business. Um, we actually are so proud to be collaborating with you on the wave program. Uh, this is a program that globally trains, uh, underserved and uh, ah, underrepresented groups, um, specifically on the Salesforce platform. And so I'm thrilled that we have provided this opportunity to train people, to certify people on Salesforce clouds and the platform at large. And specifically, we've trained over 2000 people to date in 15 countries with a goal to train over 10,000. So really excited.

Speaker H

00:38:56

I love hearing that.

Speaker F

00:38:58

Jim, if you'll indulge me, I've got one other way in which we've collaborated, uh, more recently and we launched yes SF last year on this stage. Uh, so I am incredibly pleased to share that we, uh, this is, by the way, a collaboration with Salesforce, the World Economic Forum, the Chamber of commerce here, the city, of course, and Citigroup. Uh, it was really about bringing economic value to the city and really reinvigorating our innovator mindset. And so we created a challenge using uplink and we have identified 14 incredible innovators. Um, and what I'm so excited about is we've just launched our second challenge. Um, we're thrilled with the economic value and the fact that all of these organizations have a sustainable lens to what products and, uh, services they're bringing to market.

Speaker H

00:39:54

That's amazing. Kirsten, we so appreciate this partnership. This is a true 360 degree

partnership. Thank you so much for being a great customer, for helping us with our solutions and going to market together and what you're doing for the community. We appreciate it so much. Thank you. Kiersten Rhodes. Thank you. All right, now to bring it all home, Leah, um, McGowan hair. Leah, come on up.

Speaker I

00:40:21

All right. All right, let's wrap this one. Thank you so much. Excited to be here. And as Jim and Kirsten just talked on, we got to talk about people. You can't talk about technology without talking about people. And the big piece we need to talk about is learning. So let's jump in here. I want to share with you a little bit about, uh, the concept of. Now, you guys have been hearing tons about technology, and we know that companies want to move fast. They are dying to, like, have AI as of yesterday. And we know that a lot of folks don't feel like they quite have the skills. They don't feel like they're quite ready. But that's where we come in. We are not going to just innovate without creating pathways of bringing people on. So I'm excited to share. Now, y'all hold on. This is exciting. Folks walking out aren't going to hear this, so they're going to miss the news. But get this. We are announcing AI for all. Ah. Which includes we have waived our fees for instructor led training in all our AI classes and credentials. Yes. That is the level of commitment that Salesforce has in bringing everybody along in this journey. We want to make sure that you, your colleagues, our community, your mom, your grandma, everybody has the ability to be a part of this AI revolution. And it gets better. We're also looking at creating in person training, learning right down the street in our San Francisco office, and we're going to open up offices around the world to do this training. So stay tuned. It's amazing. Yes. Now I have little pockets here. Now talk about training and upskilling and investing in yourself is talking about people. And I want to talk about somebody who's been doing this. I want to talk about Wendy Payton. Wendy Payton has been upskilling through Salesforce talent alliance, and I believe just got another certification just this weekend, AI certification. And she has earned a job as a business analyst for the national Cherokee, for the Cherokee Nation. And she's not just, uh, investing in herself, because that's one part of it, yes. But she's lifting as she climbs. She is also a mentor for other alliance learners and leads a fundraising effort benefiting domestic violence, um, victims. So without any further ado, please, Wendy, come up here. Wendy, you're amazing. Why didn't you just get another certification?

Speaker J

00:43:23

Yes. This weekend.

Speaker I

00:43:25

Just this weekend. Right here?

Yes, ma'am.

Speaker I

00:43:28

Which one was it?

Speaker J

00:43:29

I got the AI associate exam.

Speaker I

00:43:30

That's amazing. You know AI associates, Wendy, you've been doing such great things with just your life and investing in yourself and pulling others along. Tell us a little bit about what motivates you to do this.

Speaker J

00:43:46

So the first thing that I want to say is, I would not be here without this Cherokee Nation Deloitte wave program and the TACC that Salesforce has launched. But also, it's really inspired me. The mentorship that I received through those programs has really turned around. And now my biggest aspiration is to inspire others, especially within my tribal nation. Um, I was able to take the skills that I got from the wave program and use the love that I have for my tribe and deliver those skills on the internal deliverables team. Um, ensuring that vital technology is reaching our citizens and giving back in that way has been just phenomenal. In addition, during the wave program, I was able to connect with two other citizens, and we started the Kaliwohi project, which started in 2022. And, um, we not only created a piece for tribal inclusion within nonprofits and fundraising, but in addition, we are able to raise money and funds for one fire, which is Cherokee Nation's domestic violence unit for survivors of domestic violence like myself.

Speaker I

00:44:58

Amazing. Amazing. And, you know, you've been such an inspiration, and we want to be able to say thank you. So we have something that, um, as a way of all the hard work that you have done that we want to say thank you with a grateful heart. And that, my dear, is the golden hoodie.

Speaker C

00:45:20

Uh.

Speaker I

00:45:27

Thank you.

I'm so happy for you.

Speaker J

00:45:31

Yes, I do. I definitely want to.

Speaker G

00:45:32

I want to put it on.

Speaker I

00:45:35

This is amazing. Thank you.

Speaker F

00:45:36

So.

Speaker I

00:45:37

Oh, and there's golden confetti. We have to do a selfie. We have a selfie. I don't have a phone. I don't.

Speaker C

00:45:45

So real quick.

Speaker J

00:45:45

This was a five year goal.

Speaker I

00:45:48

And look at that. Just got shorter. Can I have a phone? Here we go. Oh, I want a selfie, but. Okay. Give it up for Wendy Payton, everyone. It's just amazing because it reminds us of why we do what we do, right? And when you invest in yourself and investing in others, it just keeps it going. And one of the things we want to continue to do is invest in ourselves and invest in your company's investment in Salesforce. And what's the best way to do that is trailhead. Trailhead. We've made some amazing investments in and you're going to see a lot of great features. Now, help is in one place. Your trailhead help and Salesforce help are in one place now called the centralized Help Hub. Also another great feature that we just launched, our personalized guide experience. So when you sign up, it's going to take in information and then give you recommended trails. And there's a lot of new things with trails. Trails themselves are now enhanced. We heard that you all want to learn in different ways and you're going to actually see it in action. But one of the ways we did it was with milestones. It's kind of like a coach to make sure you keep going. So you know what? Let's

just jump straight into the demo so that you can see it in action. All right, so here, Alan works for Pacifica. Pacifica just invested in data, cloud and agent force, and Alan is tasked with skilling up on those items. So where does it go? Of course, trailhead. Now, I want you to notice when he's in here, the first thing is he's asked. Ah, okay. Hi. Welcome, Alan. Let's understand what you're trying to learn here. So they click on let's get started. And then Alan wants to help Pacifica grow its business and it's taking in different information as he goes through this guided experience. And what's going to happen is it takes in all this information. And we've been this before. Like, how many people have watched Netflix? Oh, nobody watched Netflix. Really? Really, really. And, you know, when you go into Netflix or in Spotify, it takes in information so that it can create a personalized journey for you, whether it's music or movies. Well, here we're creating that personalized journey and learning. So what happens is, after Alan brings all this information in, trailhead gives some recommended trails. And so Alan sees right here, build your path to AI success. So he wants to jump right in. Now, I want you to note here we have our trail, but we have these milestones that keep track of you and help you keep going through your trail. And trails are no longer just modules. You can now actually beyond hands on challenges. You can now watch videos. You can watch Salesforce plus videos. You can have Salesforce development content in there as well as help and training articles. All right, there. So Alan doesn't want to waste any time. Jumps straight into generative AI basics now. And he's in here, he's reading. Clearly, he's a speed reader because he's going through this really quick, right? Gets down to the bottom and he's like, okay, I'm going to be brave and take the quiz in front of all of you all. And then he clicks it. And more confetti. So Alan gets his first badge. This is one of 2.6 million AI and data badges that have been earned over this past year. You all have been out there really doing it. So good on you. So now let's fast forward. Give it up for yourselves. Everybody gets it. All right. We can always celebrate learning. I love learning. So here we are. Fast forward. Several months later, Alan's back out there, and he has already done. He's on his. Wow. He's on his way to Ranger, and he's already started on his next recommended trail right here. Now, here's the thing. When Alan isn't learning, he wants to, he can connect with community, because we know one part of it is learning, the other part is connecting with community. Community is everything. And then if he wants to grow his career, he can go right here and click on role based career paths. Also, when he's ready to earn those credentials, especially since we just waived the fees, he can go in there and get these credentials and show them right on his LinkedIn profile. And then if he needs help, it's right there. All in one stops shopping right here. Alan is doing it. And that, my friends, is how Alan is driving his career and his company into the future with Trailhead. And with that, back to you, Jim.

Speaker A

00:50:36

Great job, Leah. Way to go. Congratulations to you, too, Wendy. Amazing, amazing, amazing. All right. Trailhead is better than ever. And how about that? AI for all investment. Let's give it up one more time for that and one more time for Wendy. Congratulations,

Wendy. That's great. All right, now I'm going to get us out of here. I promised you earlier, we're going to walk out of here with one key. Next step. This is your next step. Get out your phones. This is the QR code. We built a custom trail on trailhead just for you. It's got a URL and it's going to take you through all four pathways. So when you're flying home or tomorrow morning or over the weekend, while you're waiting for the soccer game to start, jump on trailhead and check out those four pathways. You're going to find the best path for you to get more success. Now, we've got one last thing we've got to do before we hit the after party right outside the door on this stage. In about an hour and five minutes, John Mulaney is going to be here. Anybody heard of John Mulaney before? All right, I think I'm going to tell my friends I opened for John Mulaney. That's going to be my new thing. So before we get out of here, John Mulaney is also playing a show tonight at the Golden Gate Theater, and we are going to give away two pairs of tickets for that show tonight, right now, right here. Ready for that? All right, so here's how it's going to work. I need everybody to look under their seat right now, and if you have an envelope taped under your chair, I need you to jump up and scream like you're on the Oprah show, all right? And then we're going to head out of here. We're going to celebrate the winners. Where? We got any winners? Anywhere? All right, come on down. We're going to celebrate the winner. Come on down. We can get to the demo booth right over here. The winners, congratulations. We're all going to head out in the hallway and have a big celebration for these winners, and maybe they'll invite you to go with them tonight. All right? Thank you all for being here. Thank you for being at Dreamforce. We will see you in the future at Dreamforce next year. Thank you, everybody.