

Unlock Success with AI: Insights from Our Experts

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Speakers:

Speaker A - 24.59%

Speaker B - 43.79%

Speaker C - 31.62%

Notes:

- And to unlock success with AI with our customer success experts. Christina Midas, EVP and GM of Amer's professional services, and Katherine Sullivan, SVP customer success product education Salesforce. Here to share their direct experience with customers.
- Salesforce has announced that we're going to give pre AI training across the world. New trails will help you get very enabled and skilled to successfully implement AI. Why Salesforce AI? Two things, trust and context.
- So what advice would you give to companies who are ready to implement an AI strategy? There's a lot of different ways to get started. We have three different ways that could feel comfortable for you. And then last but not least, we have a strategy and roadmap offering.
- Have a data strategy. Start with your data. Think about really prioritizing the use cases.

Measure, assess. Just start small and then see how it goes.

- Great advice any final words for companies ready to start their data and AI strategies. I would really emphasize the enablement side. Start with trailhead, go through the different trails and skill up. More from Dreamforce right here on Salesforce Plus.

Speaker A

00:00:00

And to unlock success with AI with our customer success experts. Here to share their direct experience with customers, the challenges they face and the solutions we can offer them are Christina Midas, EVP and GM of Amer's professional services, and Katherine Sullivan, SVP customer success product education Salesforce. Hello, ladies, and welcome.

Speaker B

00:00:23

Hello. Thanks for having us.

Speaker A

00:00:24

Now, your teams both work with customers every day. What are you hearing about AI and data from our customers? Katherine, let's start with you first.

Speaker C

00:00:33

I'll start with the excitement is real. I feel it everywhere. And when they think about what they need to do, they are realizing with the human as part of that AI important story, they need to be focused on skilling their team members, skilling up the employees, getting the human ready for that AI. And with that, it's a great week to talk about. Also that Salesforce has announced that we're going to give pre AI training across the world. We'll be doing it in person. We'll be doing streaming, and we're also going to waive all of our AI certifications. We're very excited and we are here to truly partner with our customers and our ecosystem to help humans come with the AI to power.

Speaker A

00:01:22

Agent specifically.

Speaker B

00:01:24

Agent M for specifically.

Speaker A

00:01:25

That is great news. I'm sure people are going to love that. And if you want to level up your AI and data skills, check out the link on screen. That's trailhead dot salesforce.com. einstein Dash AI trail. So it's just a simple little right off the top.

And one last thing that I'll note about that trail, it's one of our new trails and it's immersive. It's multiple different media types to help you get very enabled and skilled to successfully implement AI.

Speaker A

00:01:59

Great for all types of learners. I love that. And Christina, what are you hearing from customers?

Speaker B

00:02:03

You know, it's interesting, um, what I feel I heard from customers pre and post Dreamforce. Right. So excitement I absolutely agree with. But pre Dreamforce, a lot of how can you help us? Can you be an assistant to us? We want someone there kind of leading us through the process. And then additionally to that, why Salesforce? Aih, so what I do realize now is at the end of Dreamforce, I think everyone has the same answer. I do. Why Salesforce AI? Two things, trust and context. We've set a huge precedent as a company that's built on trust. Your data has been with us all this time. You know, we don't mess with your data. We play at the metadata level. Well, now, in this world of AI with needing the metadata for context of your data, we're kind of at the right place at the right time, and I think that makes customers feel safe from hallucinations and the things that scare them. So what I was hearing before Dreamforce is, why Salesforce AI? And I think as we come to a close this week, I think they had their answer.

Speaker A

00:03:06

Nice. So what advice would you give to companies who are ready to implement an AI strategy?

Speaker B

00:03:13

You know, I would say one gets started, but there's a lot of different ways to get started. Um, for example, in professional services, we have really three different ways that you can, can engage with us to get started. Rather, if it's a prototype, where we go and set your data up on our sandbox takes five weeks, and you have a proof point to go get budget from your CFO to continue. Or if you want to hire an expert, we call them ctos. It's not an actual CTO like you would hire in house, but someone who's kind of your technical architect support, that's dedicated to you, dedicated to your company to help guide you. And then last but not least, we have a strategy and roadmap offering. Because sometimes you just need a plan. Right. Tell me where I'm going. Yeah, just tell me where I'm going and if I've got the plan, I'll be okay.

Speaker A

00:04:02

Yeah.

So I feel like if you're looking to get started, we've tried to meet the market with three different ways that could feel comfortable for you based on where you're at, but get started.

Speaker C

00:04:10

Yeah.

Speaker A

00:04:11

And Catherine, what about from your side? What advice would you give?

Speaker C

00:04:13

You know, I get a lot of questions from the customers where they don't know where to begin. And there's two things that I would really emphasize. Number one, have a data strategy. It's foundational to having a solid AI strategy. So start with your data. And then secondly, think about really prioritizing the use cases. And I would recommend starting on a small use case. Come in, learn about it, and give yourself that opportunity to build. I'll call it that muscle around AI. So you can continue with your use cases, but prioritize and get a win. And then last thing I will call out that's really important is make sure that you're measuring the impact. Uh, be thoughtful about that use case and what you're looking to measure and make sure that you're constantly reviewing that.

Speaker A

00:05:02

Yeah, I mean, great advice for getting started in anything, but just start small and then see how it goes. Measure, assess. Great advice any final words for companies ready to start their data and AI strategies?

Speaker B

00:05:15

I would just say, Kathryn and I joke we do this a lot together, um, as being part of customer success. And the common denominator around what Kathryn does during the day and what I do during the day is learning and teaching our customers and teaching them either to be self sufficient or teaching them through setting up their environments and showing them how to do things. So I think that would be the wrap I would give on it when we come out and do this, is that for customers to feel we've got you. We have a lot of resources to make you feel comfortable and confident as you move into this new technology, however, which way you want to get going.

Speaker C

00:05:53

So I would really emphasize the enablement side. And starting with trailhead, I personally go in and I take our trails and I go and I do the hands on challenges. And I have found that

at first you might think it's intimidating, but the way we've designed it, it really brings you with us.

Speaker B

00:06:11

Yes.

Speaker C

00:06:12

And it gives you that confidence to keep learning. So I would definitely start with trailhead, go through the different trails and skill up.

Speaker A

00:06:20

Fantastic. So many great resources. You guys are obviously offering great support to people getting started out there. Thank you so much for joining us.

Speaker B

00:06:29

Thank you for having me.

Speaker A

00:06:30

And you can get your devices out to scan that QR code on screen because you can learn more by checking out the websites, [salesforce.com services overview](https://salesforce.com/services/overview) or just scan the code and you can get more information on our success plans, professional services offerings and answers to your questions. So more from Dreamforce right here on Salesforce Plus.