

# How Salesforce Builds a Connected Manufacturing Industry

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## Speakers:

Speaker A - 31.15%

Speaker B - 9.95%

Speaker C - 19.42%

Speaker D - 7.33%

Speaker E - 13.9%

Speaker F - 18.24%

## Notes:

- 72% of service and support teams in the manufacturing industry say that inefficient processes are a challenge. Salesforce is here to help with the latest manufacturing cloud innovations. Here to tell us more are Erin Kelly and Dan Melsheimer.

- Sign up for Salesforce's upcoming manufacturing Trends report. Get a preview of what's trending in manufacturing. Hear from product marketing director Cynthia Turner.

- Salesforce is releasing its latest manufacturing trends report. Here's a preview of three big manufacturing trends that will impact your business heading into 2025. Number one, manufacturers must transform to keep pace. Number three, larger focus on service and aftermarket operations.

- Kelly Rallier, senior director of solution engineering at Salesforce, and Sarah Voss, senior it manager of global CRM, um, innovation at Komatsu. Delivering hyper personalized solutions I think is really important.

- Komatsu is one of the largest manufacturers of heavy machinery equipment. Right now we're on a journey to manufacturing cloud. We're looking to standardize everything, take advantage of the industry best practices. Is there advice that you can give to other customers on a similar journey of that transformation?

- The most important part that we're looking into is to try and centralize it, right. Get all the data in that one area so that we are able to work on it. Making those decisions on that data, really understanding how end to end you're performing is really, really critical.

## **Speaker A**

**00:00:00**

And trends for manufacturing, it all starts with efficiency. Get this, 72% of service and support teams in the manufacturing industry say that inefficient processes are a challenge, according to recent Salesforce research. Fortunately, Salesforce is here to help with the latest manufacturing cloud innovations. I'm Carolyn Bathauer. And here to tell us more are Erin Kelly, senior director of product marketing, and Dan Melsheimer, principal solution engineer. Thank you both for coming. So Erin, let's start with you. Um, what are the common challenges that you're hearing from customers today?

## **Speaker B**

**00:00:33**

So as you just said, we just did some research, right. We launched the 2024 trends in manufacturing report. And one of the things that really, uh, we learned from that report was that manufacturers are looking to digitally transform and to modernize their operations, really to drive that efficiency. And the interesting thing, only 40% said that they're successful at it right now. So there's lots of opportunity in the industry, whether it's sales, service, marketing, they're all looking to how can I drive better efficiency, how can I connect to my customers better?

## **Speaker A**

**00:01:03**

Yeah. And the great thing is we help, right? We do, uh, we help with that. And I like how manufacturers can use data and AI to become more efficient. It seems like a really, really good fit. So how are, when you think about the trends and challenges, how do the manufacturing cloud innovations help with some of.

These challenges that you've absolutely, and it's important, right. Only 5% of manufacturers we surveyed said they aren't even thinking about AI. Uh, so 95%, everybody's thinking about it. So when we look at the innovations that we have coming out, one of the ones we're most excited about is asset centric service. So taking the data from your assets here at Salesforce, we really help you connect to your customers. But for manufacturers, it's customers, it's partners, and it's assets. So now you can bring in telematics data, you can bring in the information around the asset and the history of that, and then you can get some intelligence and insights from it. Automate some agents to help you with your work.

## **Speaker A**

**00:01:56**

Yeah, Agent Force is everywhere. I think one of the things that has always fascinated me about the way we go to market and help our customers is having that industry first approach. Like you mentioned, manufacturers are all over the spectrum when it comes to how ready they are. You're talking about that digital transformation. Organizations may just be starting that, but when you start to think about implementing that technology, that's where those efficiency gains come in. And so we've seen a lot of customers have a bunch of success, success with that. So I'd like to now do a little bit of a deep dive. We love to show how these things work into the new manufacturing cloud feature. So Dan is here with a demo to show off the latest sales and service innovations, including asset service, lifecycle management. So take us through that.

## **Speaker C**

**00:02:40**

Perfect. So let's take a look at some of these demonstrations and see how we can innovate on top of it. Using manufacturing cloud, we're able to take a look at our sales agreements and be able to add our products to those agreements to see how they can perform over time. With our customers. Quickly adding those products, we can look into the details of those products, such as what attributes we can add, such as things like the product packaging, uh, type, the quality, so we can really understand what products are we selling to our customers and how are they, uh, running over the plan schedule. Adding all this information allows anyone who's looking at those sales agreements to be able to understand what is our plan against this customer and how is this sales, uh, plan actually performing over time, making it very efficient to see are we on the right track with our customer or do we actually need to reach out to them and maybe make some changes. But looking at those agreements, they can become very big, very complex. How am I able to look now, being able to dive into these, I can look at those agreements and say, what are the product details associated to it? What are those attributes? And how can I understand what I need to do to execute? But using that information, I kind of could get lost from time to time. So let's take the easy way out. Let's use Einstein and be able to do summarization on top of those product campaigns to be able to see all the details of that products are actually working, what products maybe have deviated off of that schedule?

And so I have a good understanding action I should take against that. But also on the service side, what can I do from an asset service centric approach? Being able to use Einstein again to summarize those asset details and all the data that's coming from the telematics. So I have a quick overview of the details that I can quickly get up to speed on. What's the current state of this asset? Once I understand all the details, such as those action alerts, maybe, uh, cases that have been associated, I can even understand any active warranties, but I can deep dive into that data, too, and understand what's its current health score related to it. And is there any critical issues that I need to address now. Now we're able to even use our asset hierarchy to understand all the subcomponents, um, that are related to this asset. So I can really understand all the details for it and be able to quickly take action. And of course, look at my contracts for it, too. So a lot of innovations here.

**Speaker A**

**00:04:45**

That's amazing. And you know, just looking at that demo, those screens, and I'm going to ask you a question here because you are really ingrained with our customers. Seems like there's a lot of data behind, uh, just that screen we saw. Because asset management organizations can have so many assets and so many classes. So when you're talking to customers about data management, what is the advice that you give them? Uh, in the manufacturing industry?

**Speaker C**

**00:05:11**

Yeah. It's being able to take a look at what data you have coming in and what are the important things that you actually need to look at from that data set to make sure that you're taking the right action at the right time to address your customers need. So bringing that data in to make sure that you can actually make action associated with that CRM, um, data. So now that those, uh, customers can understand, these are the things I need to execute on.

**Speaker A**

**00:05:32**

That's great. Thank you for that. Um, Aaron, biggest takeaway is that you want customers know about what should they plan for coming out of Dreamforce.

**Speaker B**

**00:05:41**

Yeah, I think it's just continuing your journey. Right. So hopefully everyone enjoyed the keynote. They just watched. Learning a little bit here, hearing Dan talk about asset service lifecycle management. The journey doesn't end here. So go on trailhead, get hands on in manufacturing cloud, learn about agents, build your first agent, really experience it, and then think about how can I bring that into my organization? What are my unique challenges that this can help me solve? Because everyone has their own unique way of

looking at what that solution could be.

### **Speaker A**

**00:06:09**

Yeah. And then we stay true to our low code, no code, pro code tools, especially even with agent four. So, um, you know, manufacturing customers who are comfortable moving forward and building agents, great. But then those out of box agents can be taken advantage of is where you get started, essentially. Um, so Dreamforce has been amazing. I can't believe it's day three. Um, but is there one piece of advice you could give to customers or one thing that they should look out for? Dan, things, uh, that you're excited about?

### **Speaker C**

**00:06:39**

I'm excited about being able to take information from our assets, be able to bring them into Salesforce, uh, to be able to proactively help our customers before potential. There's issues. So being able to bring all that together to maybe help issues don't arise for our customers.

### **Speaker A**

**00:06:55**

Right? So thank you so much for your insights and to help your organization make more informed decisions to drive business success. Uh, sign up for Salesforce's upcoming manufacturing Trends report. Just scan the QR code on your screen or go to SFDC co trends in manufacturing for a preview of what's trending in manufacturing, we head to product marketing director Cynthia Turner.

### **Speaker D**

**00:07:20**

The manufacturing world is moving at an unprecedented pace thanks to new technology and shifting market trends. To help companies make informed decisions, Salesforce is releasing its latest manufacturing trends report, bringing you insights from over 800 industry leaders across the globe. Here's a preview of three big manufacturing trends that will impact your business heading into 2025. Number one, manufacturers must transform to keep pace 85% of manufacturers reported that they need to transform their operations to stay competitive. Manufacturers are under pressure to transform their sales operations, optimize pricing, strengthen channel partnerships, and improve their services to increase profitability and customer satisfaction. Number two, manufacturers aren't hitting targets. Profit targets. Only 38% of manufacturers are exceeding their profitability targets. They see technology, especially AI and data driven tools, as a key to overcoming challenges like supply chain disruptions, economic uncertainties and sustainability pressures. Number three, larger focus on service and aftermarket operations. 97% of manufacturers are pursuing strategic changes to their service and aftermarket operations, including 26% who characterize these as complete overhauls. To explore the full data in our manufacturing

trends report and see how your organization compares to industry benchmarks and help you make informed decisions that drive your business success, scan the QR code on your screen or go to SFDC co trends in manufacturing to sign up for the latest trends report. Thank you.

**Speaker A**

**00:09:04**

Welcome to how manufacturing trailblazers deliver better service, where we will spotlight our customer Komatsu, and how they use Salesforce to enhance their service experience. I'm Carolyn Bathauer and I'm joined by Kelly Rallier, senior director of solution engineering at Salesforce, and Sarah Voss, senior it manager of global CRM, um, innovation at Komatsu. So, Kelly, we're going to kick it off with you, but thank you both so much for being here. Can you briefly tell us about your role here at Salesforce?

**Speaker E**

**00:09:34**

Yeah, I've been here for 13 very exciting years, and the last five I've been working with customers just like Komatsu and manufacturing and distribution. And our solution engineers are really about sitting down with customers, understanding their challenges and aligning innovative solutions that are all powered by Salesforce.

**Speaker A**

**00:09:51**

That's great. Unsung heroes. Absolutely. So you work closely also with our customers like Komatsu. So delivering hyper personalized solutions I think is really important. And so Sarah, we are thrilled to have you here, but if you can tell us briefly what does Komatsu do?

**Speaker F**

**00:10:10**

Sure. Thank you for having me. Komatsu is one of the largest manufacturers of heavy machinery equipment. So mining, construction, forestry, we produce this and sell it to our dealers and distributors for our customers to kind of help meet the needs of society.

**Speaker A**

**00:10:24**

Great, great. So, um, Sarah, can you tell us a little bit about your journey with Salesforce?

**Speaker F**

**00:10:30**

Yes, certainly. So Komatsu has been a longtime user of Salesforce. We've used it for over ten years and as we know, things were a lot different ten years ago. So our is got a lot going on in it for sure. Uh, we have a lot of customizations we've kind of built from the ground up and most recently we've kind of had a lot of custom opportunities, custom cases. Right now we're on a journey to manufacturing cloud. So right now we're looking to

standardize everything, take advantage of the industry best practices offered by manufacturing cloud, and getting our feet started with the warranty claim management.

**Speaker A** **00:11:05**

So one of the things that our customers love to hear is from other customers. So is there advice that you can give to other customers that are on, on maybe a similar journey of that transformation?

**Speaker F** **00:11:16**

Definitely. I mean it's going to be an incremental approach for us.

**Speaker A** **00:11:19**

Right.

**Speaker F** **00:11:20**

Because we've had it for so long and we've got a lot going on in it, a lot of case record types, a lot of processes and procedures. So we're working very closely with our business to make sure that there's minimal disruption, but it still meets the needs. One of the things that we're looking advantage of with the standard functionality is to be able to take advantage of all of the enhancements and the releases three times a year. So it's kind of been, you know, for those that are still on the custom, that's kind of one of the frustrating parts is there's exciting new releases on maybe an opportunity or a case, but in order for us to provide that to our business, we'd have to build it out customization. So I'm very excited to be able to just hopefully turn on and enable these features in the future.

**Speaker E** **00:12:00**

Yeah, and I think that's a great story to share, Sarah, because, uh, a lot of our customers end up in this spot where you try to find the balance between custom objects and standard objects. But to your point, when you marry those really well together. That's when you can really take advantage of, of all that innovation that's coming out. And we saw so much innovation in the keynote, um, all over Dreamforce. Uh, what really excited you about the keynote? And what do you think other customers like Komatsu could take advantage of?

**Speaker F** **00:12:28**

One of the things, you know, obviously the keyword is agent force, so I want to take a look at that later today for sure, you know. Um, and I think that could obviously provide value. I'm looking to see where we could implement that, really. The other focus is on the asset service lifecycle management. Right. So looking at our assets, how could we do more with

it? We currently do a lot with machines and tracking the hours and the data and kind of understanding what parts we'll be needing to replace. But I'm looking to further expand on that and even perhaps tie in the agent for us to provide those summaries. Um, I'd really be interested in asset health score, you know, what is the asset? How can we provide that data to our customers and more so our dealers so that they can work with our customers and help them make sure we've got the parts in place, we've got it ready, and even proactively so that they don't have any downtime.

**Speaker A**

**00:13:13**

Right. And then because you, you not only have to connect your internal employees, your customers, your partners, there's probably a huge network that you have to write conversations around and making sure everybody is on the same page and you're getting that data back, I'm sure is pretty critical. Absolutely. And you brought up agent force and AI is the talk right now. So, um, where do you see AI and Salesforce being able to help manufacturing customers?

**Speaker E**

**00:13:37**

Yeah, well, I think Sarah mentioned a really good one, which is proactive maintenance. Is not that out of reach for our customers now? I mean, with the right data, with an agent, you're able to really understand, is this machine going to go down and you can use that data to deploy a technician to get out in the field, all those people that you have to coordinate with. And that, um, just is really valuable data. It leads to an amazing customer experience. It can also help you with your quality assurance on your products as well. And then on the sales side, I think there's, we can't solve every supply chain issue in the world, but the agents can help you to better understand, uh, the demand, your forecast, and then they can leverage that, um, forecast and you can save money on raw materials and get better understanding of your inventory. So there's so much out there, but those are a few that are top of mind.

**Speaker A**

**00:14:28**

So I'm going to go this direction because you brought up thinking about uh, that increased efficiency in different areas. Sometimes just incremental improvements across a business can have a huge monetary impact. So either of you, how do you think about data and how that drives some of these experiences? What would you recommend, uh, organizations pay attention to when they're thinking about that data layer?

**Speaker F**

**00:14:52**

I mean the most important part that we're looking into is to try and centralize it, right. Get all the data in that one area so that we are able to work on it and do it. I know we've got a lot of different disparate legacy systems, as many companies do. Right. You've taken a



different journey, but now it's just trying to aggregate that data into a centralized location so you can act upon it.

**Speaker A**

**00:15:10**

Yeah, absolutely.

**Speaker E**

**00:15:11**

Yeah. And we have so many tools that can help here. You know, you have mulesoft you can bring in from other, other tools. We have data cloud and so it's just a matter of, yeah, sitting down and making sure that it's mapped correctly that you have, you know, the asset at the center of everything that you do. Especially for a lot of manufacturers that is the case. Um, so yeah, it's about connecting all that data and it starts with the data. So you do have, don't get that part wrong. That's where then, like I said before, that's when you get that, you get Salesforce working alongside. It really gets exciting on what you can do.

**Speaker A**

**00:15:42**

Absolutely. Making those decisions on that data, really understanding how end to end you're performing is really, really critical. Thank you both so much for coming. So uh, to sign up for a free trial of manufacturing cloud, scan the QR code on your screen or head to SFDC co mfg free trial our Salesforce plus manufacturing content continues. Stay tuned for our manufacturing cloud sales blazer spotlight with Metso Corporation, a uh, finnish industrial machinery company that provides technology and services for process industries.