Sales Cloud Keynote: Accelerate Growth, Pipeline to Paycheck

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Speakers:

Speaker A - 15.19%

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Speaker F - 14.97%

Speaker G - 9.89%

Speaker H - 12.86%

Speaker I - 2.71%

Speaker J - 8.97%

Notes:

- Please welcome EVP and GM sales cloud Salesforce, Cathen Carkanez. How's everyone doing? I'm seeing a lot of sales blazers in the audience. Let's give it up for our salesblazers.

- Behind the scenes, our sales agents are connected to your sales workflows. They know your account plan, they understand your forecast. Behind the scenes data cloud is powering all of these responses. I hope we all get ready together to bring agents for sales coming in October.

- Sarah is the global sales excellence lead for Accenture. Has been on a mission to improve the efficiency of 55,000 sellers. Leveraging Einstein analytics to help identify risks, winnability and automate insights.

- The concept of an agent, intent driven, intelligent, doing things on our behalf, is a game changer. I think we see that really reinventing the way we do sales at Accenture. There is a critical, critical next step and that is to simplify your technology.

- New revenue cloud built natively on the Salesforce platform. Built API first, which means you can create quotes in orders from anywhere on any channel. Bringing together everything from pipeline to paycheck. An integrated platform is an imperative in today's world.

- Sales cloud is available in 14 industries. Over 300,000 sales blazers connected through the sales Blazer community. We just launched our slack community. Every single thing that you saw today, you can experience in campgrounds today.

Speaker A   00:00:44
Please welcome EVP and GM sales cloud Salesforce, Cathen Carkanez.

Speaker B   00:00:51
Good afternoon, everybody. How's everyone doing? I'm seeing a lot of sales blazers in the audience. Let's give it up for our sales blazers. It's my incredible privilege and honor to welcome you all to the sales cloud keynote today. Thank you so much for joining us. I'm so happy to be here in this room with you. Tons of more people are coming in. Come on over. Uh, and a big shout out to everybody who has joined us online. Thank you so much. We really appreciate you joining us. Thank you. Thank you very much. Now, we've got an exciting show planned for you today. It's all about giving you the playbook to navigate this crazy world of aih. We're going to do it together. But before I do that, I want to start here. I want to start by saying thank you to the thousands and thousands of customers across the world, uh, who have chosen sales cloud, who trust sales cloud to be their growth platform. It is your feedback, it is your support, and it's your love that makes sales cloud the number one AI CRM. And just last week, Gartner named us, uh, the leader in the Gartner magic quadrant for the 18th year in a row, 18 years in a row. That's pretty special. And end users

on g two have voted sales cloud to be the number one CRM. M for SMB, that's pretty incredible. Thank you very much for your support. And sales blazers worldwide, they use sales cloud to get deals done. Did you know, on a peak day, a peak day, more than 3 million opportunities are closed on one day? That's pretty incredible. And once again, we are at the cusp of where selling is going to change a lot. The way we sell is going to change a lot. AI is changing everything. It holds a lot of promise. But let's face it, there's a lot of noise, too. Uh, and on top of it, a lot of folks are trying to dyi their AI do it yourself. They're, uh, dealing with hyperscalers. They're dealing with model training, they're dealing with model retraining. Uh, they're stumbling into data leak issues, security issues, cost overruns, um, you name it. Now, some of these acronyms are really cool to sound GPT, GPU, LLM, RAg. Sounds really cool. But the only acronym that needs to matter is ROI. Every AI, uh, conversation needs to be a business value conversation. And that's what our focus has been. That's what you heard Mark talk about yesterday when he introduced to you agent force. What we are doing is bringing all these forces together to power your marketing team, your service teams, and your sales teams. And what I'm going to do today is double click into how AI is going to transform your organizations to accelerate growth from pipeline to paycheck. And we're going to do it step by step. Uh, let's start here. Uh, one of the first things I want to show you is, uh, the AI in predictive AI. Now this was, um, in simple terms, it's about tell me something that might happen in my business. So for example, what is the propensity of this lead converting? Great. Then came generative AI. This was about don't just tell me what might happen. Why don't you help me do the job? So don't just tell me this lead has a high propensity to close. Why, uh, don't you write me an email to this lead so that this lead converts? That's also exciting. But today we are entering the third world of autonomous AI. Don't just tell me what might happen. Don't just help me do the job. Why don't you just get it done for me? This is what AI is meant to be and that's what today is all about. What we have done is to abstract away all that complexity from you and to build this in the heart of your selling experience. Let me show you what that means. Look uh, at that screen. That's all generated by AI. It's an autonomous experience based on all your emails, engagements, calls. Imagine a buyer relationship map built for you out of the box. Imagine your contacts auto updated. How about never ever data entry? That would be exciting. Uh, or uh, when you are on meetings and you are on calls, don't take notes. Don't capture action items. Focus on your customers deeply. Let AI do the rest. Conversational AI at your fingertips. Very powerful. Or my favorite, uh, you know, uh, those end of the quarter last week surprises. Yeah. Have you got them? I have. Trust me. Uh, I don't like them. Use AI to eliminate problems before they become problems. See what might happen in your business and then give your teams the ultimate pipe machine. How many of you feel you have enough pipeline? Nobody, because nobody has enough pipeline. We all need more pipeline and that's why you need a pipe machine. Understand where to focus. Bring all the data together, drive insights. And then I'm going to keep going. This is going to keep going. Sales signals. Get a bird's eye view of your business. Every interaction, every prospect, engagement, every call you can't on your own, figure out where to focus. Let AI tell you this deal needs help, that

seller needs help, and you have that real signals of your organization. Pretty powerful, streamlined planning with AI based decisioning that is pretty impactful. Or you know my personal favorite, um, guided selling. Um, it's like a gps for your sales team scale best practices. Give turn by turn directions to all your sellers. Make every rep your best rep. That's going to be exciting. And then we enter this whole new world where you hire agents, you hire agents. Uh, hire our, uh, agent SDR to nurture prospects 24 by seven. And these agents will meet your prospects on multi channel omnichannel, wherever they are, including WhatsApp, and speak any language. That's pretty incredible, but don't stop there. Also hire a dedicated sales coach for every seller. How cool that would be. Give every seller the ability to practice their pitch, to role play, to figure out how to, uh, approach the conversation. But what I like is like a good coach. This agent coach also comes with you in the meeting to give you real time guidance. While you are in the meeting, a competitor was mentioned. Here's a battle cardinal. This word was discussed. Here's a negotiation. All of this is not futures, it's not vision. It's here now in the new sales club. And that's what we're going to take you through for the rest of the presentation with live demos. What we are going to do is get started with AI. But there's one more thing, there's one more thing we all need to collectively focus on. It's not just about AI. Look, there is a proliferation of tech stack endpoint solutions. You can't get effective AI if you are working in 50 applications. You need to start consolidating your tech stack and simplifying your tech stack. These are two sides of the same coin and we are going to get started with AI. And to help me do that, let's bring up on stage senior director of product marketing, Connie. Connie, take it away.

Speaker A   **00:08:36**

Thanks, Kaitan. All right. Now, as many of us know, a lot of AI conversations today, they dive right into the details of the technology. First, you just heard some of them, um, models, prompts, hallucination, toxicity, but, uh, for sales, let's change that. Every AI conversation should be an ROI conversation, a productivity conversation. And we've heard from so many of you here in the room and so many people online that as promising as AI sounds, you need some help, some guidance on how to get started. Well, thankfully, we've got you covered with seven practical use cases to get started with AI and these are all out of the box so you don't have to diy your AI. I'm about to show all of this in action. Shout out to Logan and Victoria who are going to help me with this live demo. So I don't know about you all. I don't like manual data entry and thankfully AI can automatically capture my calls, my emails, my meetings, can even auto create contacts for me as I can see right here on my seller homepage. AI then takes all of this capture data to build relationship maps for every account. For me that has.org charts, titles, buyer attributes and even past collaborators, this is huge in helping me connect the right dots to make sure I'm building the right relationships. AI is also my trusted sales assistant agent Forest can give me recommendations to help me prioritize my day. I can see which meetings I should put at the top of my agenda, leads and opportunities that need my attention, and even tasks and

follow ups for me to tackle first. And if I'm working outside of Salesforce, sales cloud comes with me too. So if I'm on LinkedIn catch with one of my accounts, I have all of my CRM data with me on the right. And Agentforce is here too. With the context of this page and CRM grounding, agent force can recommend upsell opportunities for this customer. Now AI also comes with me when I'm working in outlook. With prebuilt prompts grounded in CRM data, AI can help me generate personalized emails for my customer in just seconds. And we've also brought AI to our brand new mobile experience. And everything I need on the go is right here. I've got all my data and my analytics for my business, which meetings are coming up next, my to DOS, and even AI scores to help me manage my pipeline. And because this is a contextual experience with action built right in, I can kick off a call and even an email with just a swipe. And everything here is also available when I'm working from my tablet. And this split screen view is my personal favorite. And the best part about all of this, it's fast. In fact, we've improved the performance of our mobile experience by more than 80% to give you a true native consumer grade experience on the go. Now, AI also comes with me in my meetings. We talk a lot about how AI can help me automatically transcribe my calls, but can also generate call summaries that highlight customer impression from the call, a summary of what was discussed, and even next steps coming out of that call. And AI can log and update my CRM so I never have to log a call again. And if I have a specific question for a call, AI can help too. So let's see if any pricing was discussed during the call. You are seeing how AI is supporting me across my calls by generating insights and saving me time. Now AI also guides me when I'm prospecting. We are launching the very first data cloud app with prospecting center and everything you see on this screen is powered by CRM and third party data and AI models are ranking prospects for me. And because we're connecting marketing with sales, we're making it really easy to build complex segments with just clicks. Now if we drill into a specific prospect, I can see how data cloud is transforming all of this data to scores to help me prioritize my prospects. I can see engagement scores coming from my website and experience cloud fit scores coming from zoom info and intense scores coming from demand base. Now if we toggle over to the prospects tab and you look really closely at Lauren Bailey, she's a contact. And then Steve, the second one, he's a lead, all linked to the same account in one single view. And this is all possible because of cross entity identity resolution. Try saying that five times fast. All right, let's hop into a Salesforce channel. A lot of activity has been happening since I've been last year and AI can help me catch up with a one click summary. Now AI can also guide me to make sure I'm caught up in all of my product and industry use cases. Now because Slack is where I can tap into the collective mindshare of my team, AI is sifting across conversations, CRM records and even files attached to channels to generate these insights. Now as a sales leader, AI can help me stay on top of my business and my team. This is our brand new conversation hub. It gives me a bird's eye view of all of my team's call activities. Now on the right I can see some of my team's recent calls and in the middle I can see what customers are saying in those calls. So let's dig deeper there. And thankfully I don't have to do the digging. AI analyzes the thousands of calls that my team is conducting and surfaces all of the key insights and

themes for me. So I can see how my competition is showing up in my calls, which opportunities are impacted and even call snippets extracted directly from the call. This gives me concrete data to help me coach my sellers. Now AI also helps me see into the future to make sure that I'm hitting my targets. In pipeline inspection, I can see opportunity scores in the middle and on the right. I can see deal signals like what topics were discussed in recent calls, even a detractor that's been identified in my deal. Having all of this data for the deal in one place helps me inspect, prioritize and focus my team. Now, in my forecast I can easily see what's changed out of glass with deal signals and AI can even help me generate predictions for my forecast. And in the commit calculator, I have a built in scratchpad to help me model my m forecast. No more need to work in spreadsheets or manual data analysis for days. With just a few clicks I can model my forecast with real time data. Now, you've just seen our seven AI use cases in rapid fire and everything that we just showed you is Ga today. Now let's make this even more real and hear from one of our amazing customers thanks. About how they're using our AI and our tools. Let's roll the film.

Speaker C   00:15:58

There's nothing worse as a salesperson than.

Speaker D   00:15:59

Not hitting your goal.

Speaker E   00:16:01

Thanks is a digital gratitude platform. We help our clients build relationships with thoughtful gestures of appreciation. In my four and a half years of thanks, we've grown well over ten x and I don't think we would have been able to do that if we hadn't made the switch over to Salesforce.

Speaker F   00:16:16

My favorite feature, hands down is insights.

Speaker E   00:16:19

Agent Force definitely gives us a leg up.

Speaker D   00:16:21

I'm not going to have to focus on these low priority tasks that uh, Agent Force is able to do for me.

Speaker E   00:16:26

It'll help us sell more, sell better and come out on top.

Speaker G   **00:16:33**

What an inspiring story. I'm Amber Armstrong and I have the absolute joy of leading marketing for sales cloud. Today I get to recognize three of our incredible sales blazers who've driven amazing results for their business and for their customers. So let's get started. Our first award today goes to Dan Rulin, VP of uh, sales at. Thanks Dan. Welcome.

Speaker D   **00:17:01**

Thank you.

Speaker E   **00:17:02**

Amber.

Speaker G   **00:17:03**

We're so excited to have you here with us today. I'm still just flabbergasted. You increased sales by 15% per rep, 25% per rep, ten x for the business overall. That's incredible. How did you use AI to hit those numbers?

Speaker E   **00:17:21**

Well, one, it's great to be here representing. Thanks. Uh, we're incredibly proud of what we've done as a company and Salesforce technology has certainly been a big part of that. Uh, you mentioned that we increased our average reps revenue per year by 25% since we made the switch to Salesforce last year. I also want to add that quota attainment is up 30% in that time.

Speaker A   **00:17:43**

Amazing.

Speaker E   **00:17:43**

And uh, the AI features have certainly been big. That wasn't really the initial reason for why we made the move to Salesforce. It was the reporting, it was the customizations. But it's been quite the pleasant surprise, I can tell you that.

Speaker G   **00:17:55**

I love it. Well, that is exactly why we are so excited to give you the award for accelerated growth. Thank you so much. And what an incredible lead in. For our next speaker, please welcome to the stage SVP of product management, Maryam Patel to take us through the

future of AI.

Thank you, Amber. You just saw how generative AI makes sellers more productive. Well, I'm here to talk about the next wave of AI, supercharging sellers with agents. Because sales teams, when humans and agents work together, that's when you unlock new levels of success. So I am so excited on the stage today right now for us to introduce agent force for sales. This is what sales AI was meant to be. Because with an SDR agent, you can nurture prospects twenty four seven. And with a sales coach agent, you can give every single rep their own dedicated sales coach. But instead of listening to me talk, let's bring Victoria and Andy to the stage so that we can see a live demo. I'm going to start this demo in a whole new way in setup. Why? Because there are thousands of organizations out there with leads that you just can't scale to handle. And I want to help you by giving you your very own dedicated SDR agent. We've made this process simple and opinionated, so it's clicks, not code, for you to get started quickly. You can even pick your own agent Avatar. Once you do that, you want to look here. We want to customize this agent to work within the constraints of your business. Pick how it wants to engage with your prospects, pick the topics that you feel comfortable having it connect with your prospects for, and use lead routing to slot it into your existing selling motion. Now, we also have to train an agent. And what I love is that we can give the agent the exact same materials that we would give a human seller, like product information and pricing information. And behind the scenes data cloud is turning all of this unstructured data into targeted, trusted, accurate responses that the agent can use on the fly. Alrighty. With just those few clicks, that is all that it took to get your SDR agent running. So let's take it for a spin. On the left side you are going to see the agent's workflow. And on the right, that is actually the prospect's Gmail. To get this personalized email sent out, the agent had to figure out what do I know about this prospect? Looking across CRM data and external data and any context it was given. And at the very bottom, see how the agent is identifying itself. That is an incredibly important signal for trust. Now the prospect asks a question. We definitely don't know what a human is going to ask, but thankfully, with our atlas reasoning agent, the agent knows exactly how to respond. It's using all of that information inside of data cloud to structure exactly the response that's needed. And if this was a more complex question or a question across a variety of different topics, no worries. Atlas has you covered. Alrighty. This prospect feels good. The agent knows exactly how to get a meeting scheduled because all of the reps availability is stored right inside of CRM. So with one click, the prospect can pick the time that works for them. And now the most important part, the agent is doing a warm handoff with the rep, making sure that they know all of the conversations that handle the questions that were asked so that this can be a warm experience. Now agents are great at multitasking, something I'm not necessarily always great at, but they can talk to multiple prospects at the same time. So here you see that they're talking to another prospect on SMS and then another prospect on WhatsApp. And

what I love is right here. The agent speaks the language of the customer. I didn't need localized materials to get all of the agents answers in the right language. So now I can nurture pipe worldwide. This is amazing. Okay. And because trust is our number one value, we have built monitoring and auditing in from day one. You can look at all of the conversations that your agents are having with your prospects and seeing what the SDR agent is saying. You are the boss. You can take over this conversation at any time because you know your customer relationship the best. Now I'm going to totally switch gears. Who here has thought I need a personal trainer? Really just a couple. I've definitely thought of this week. Um, but for me, I want to make sure that we can give every single sales rep their own dedicated coach. That's something they don't have today. So let's pretend I'm a seller and my agent knows that right now I have a really critical negotiation coming up and it's prompting me to go into a role play. This is an incredibly effective way to practice. So here I am in my home office. I'm getting ready for that prep. When I'm ready for my role play, my agent is able to look at all of the CRM context, what my customer has said, the concerns they have, and it's prompting me in a role play I can practice what I'm going to say and what I love is at the end of this practice I get personalized, non judgmental feedback. When I click here, I see deal summary at the top. It's targeted to this deal, targeted to this stage and exactly related to what I was talking about. It also tells me how I can improve so I can get ready for that big meeting. All righty, let's jump into game day. It is game day and my coach is on the right. Don't look at my face on the left, look on the right hand side panel. That is my sales coach and it is with me in this meeting. So as the customer is talking about a competitor, I'm getting a nudge of what I should say and it's even giving me negotiation tips. And at the end of the call, all of my follow up items are right there for me so I can get going and stay accountable. Alrighty. You just saw agents in action. This was amazing. And what I love is that with agents, it's not just what you saw. The simple, straightforward experience where we took the hard things and make them easy. Because behind the scenes, our sales agents, they are connected to your sales workflows. They know your account plan, they understand your forecast. It's connected to the Atlas reasoning engine. So it's giving you those trusted, structured responses. And behind the scenes data cloud is powering all of these responses. That is how your corporate knowledge is coming through. That is how it connects to your customer 360. It is so amazing. I hope we all get ready together to bring agents for sales coming in October and to hear how, yes, uh, you can give me a clap. And to hear how one of our customers is bringing this live. Amber, I want to bring it back to you.

Speaker G   00:25:20

Thanks so much, Marianne. I am joined here with our next award winner, Sarah Porter. Sarah, welcome.

Speaker C   00:25:29

Thank you so much for having me. So happy to be here.

Sarah is the global sales excellence lead for Accenture. And Sarah, I know you've been on a mission to improve the efficiency of 55,000 sellers.

Speaker C   00:25:43

Yeah, that's right. We started our journey about a decade ago with Salesforce enabling 55,000 users, as you mentioned. And I think we've done that in three specific ways. The first was embedding our sales methodology into the tool to help improve outcomes. The second was ruthless simplification and standardization of the processes, doing things like fast tracking approvals for our sellers. And then the third was really starting to put in AI into the tool, leveraging Einstein analytics to help identify risks, winnability and automate the insights into the hands of the leader. So it's been a great journey. It's really helped us improve the accuracy of our data, adoption of the tool, and really scale.

Speaker G   00:26:23

I love it. Well, we've talked a lot about it. It's a single source of truth. And then doing it in the three phases that you mentioned, really making it all come together. I also know you've been thinking a lot about agents. Tell us what you're thinking.

Speaker C   00:26:36

Well, I think the past two days have been pretty remarkable, very exciting for all of us. I think the concept of an agent, intent driven, intelligent, doing things on our behalf, is a game changer. I think we see that really reinventing the way we do sales at Accenture. A lot of what we've been doing is implementing capabilities, help me do my job. So take something like, uh, a best practice and digitize it, automate it and push it out. I think now as we're looking at these agents, our mindset is shifting to do it on my behalf. Do it on my behalf. So how does an agent create something like an opportunity plan, assign the tasks, engage the parties and really manage the process through the lifecycle of the deal? It's like the Cape to Clark Kent. Like how can we actually think about supercharging our teams so we can scale, but also free up the capacity of our folks to be thinking about strategic value with our clients, building trusted relationships and taking things to the next level. Thrilled to be here.

Speaker G   00:27:36

Well, that vision is exactly why we're giving you the vision for the future of AI awards.

Speaker F   00:27:42

Thank you.

Speaker C   00:27:42

Thank you so much.

Speaker H   **00:27:43**

It's wonderful.

Speaker F   **00:27:43**

Thank you. Thank you.

Speaker G   **00:27:47**

And so we've talked a lot about AI, but there is a critical, critical next step and that is to simplify your technology. So please welcome to the stage EVP and GM of revenue cloud, Meredith Schmidt.

Speaker H   **00:28:06**

Thank you so much, Amber. It's so exciting to be here with all of you today. An integrated platform is an imperative in today's world and I know this firsthand. I managed revenue operations for Salesforce for 15 years until I started coming to product. And I'm telling you, this is a dream come true. The missing pieces of sales cloud are together on the platform. Show of hands, how many of you need to create quotes. Nobody does. Okay, I think every one of you does. How many of you need to invoice your customers, manage orders, pay commissions, build sales plans? That literally should be every one of you in here and on the phone. On the phone, uh, online. Um, this is what's so exciting. This is why we have invested in revenue cloud and sales performance management. This is our only solution, bringing together everything from pipeline to paycheck. And we're going to talk about sales performance in a moment. But right now I am extremely excited to introduce you to the new revenue cloud built natively on the Salesforce platform. This is a first for us. We are extremely excited. It's also built API first, which means you can create quotes in orders from anywhere on any channel. We've simplified the experience, modernized the UI, and AI is infused everywhere. It's also composable so our apps and our industries cloud can use all components of this platform right now. Now. And our customers love this, right? They've got complex revenue processes. They're using spreadsheets, our number one competitor, and they're using homegrown tools. They've got point solutions. This is why revenue cloud is a game changer, right? We have brought it all together on a single platform. But what we did not do is we did not just rebuild CPQ in billing, which are fantastic products and are not going anywhere, but we've taken the best of our managed packages and built a single product, delivering the entire revenue lifecycle from, uh, quote to order to invoice. Okay, now let's see this live and welcome Vance and John to help me with the demo. Okay, we're going to start as a sales rep. I just received an email from my customer with some products they're interested in. Now, with the power of AI and APIs from revenue cloud, not only has my opportunity been created for me, but look at that, uh,

I've got a quote that is brand new. So, not just that, let me look at what's in the quote. Exactly what my customer asked for. And by the way, we mentioned spreadsheets. This is a new spreadsheet like experience, exactly how our reps like to work, unfortunately. So here we are. We've killed the spreadsheet now and brought it to our product. Now they've asked for a small change. They want to change the quantity from one to five. And what we see here is configuration rules running real time. And I've been notified that there's another required product. And lucky me, it's already been added for me. Thank you. Einstein. So we're going to save this and my customers now ask for a discount. So we're going to go ahead and offer a 20% discount. I know I can approve that myself, but what I love the most is right here. You can hover over the net unit price and this is what we call the pricing waterfall. It explains to me exactly how this price was calculated. I see the list price, the bundle discount and any manual discounts, making it super easy for my customer to understand and for me to explain it. Now, I'm happy with this. I'm going to generate the PDF. I'm going to be using my new native docgen tool to do this and send it off to the customer for signature. Ok, now fast forward. The quote's been signed and my order's been activated with all this automation and validation running behind the scenes. But what you see here is my order. Products match exactly what was on my quote. So now my favorite part of our product, something we called dynamic revenue orchestration. As an order management specialist, my job is to deliver the products and services to my customer. Here on the left you can see all those products that were ordered and on the right you'll see something called a fulfillment order. Often it's a one to one match between the commercial product and the technical product. But a lot of us sell bundles right when we have bundles we need to decompose a bundle and make sure we actually deliver every bit of that in a configuration for our customer. So this is where it gets really exciting. Let's go look at the fulfillment plan here. What you're seeing is the ability to orchestrate all the components of this product for delivery. You can have manual tasks, call outs to third party systems for provisioning or delivery of physical, uh, goods. Uh, and then you can have automated tasks inside Salesforce. So my job as an order management person, I got to go in, complete my manual task that launches the flow for me, these are all flows behind the scene, connecting and orchestrating. So now that order has been provisioned, my last step and it's been automated for me is it converts the order to assets. And what is an asset? You may ask me, an asset is just a product. But within the world of subscriptions and recurring revenue, you want to know what is the monthly recurring revenue? What is the lifecycle of the assets? What does my customer own? You can see all the changes visually easily. This is the only platform that brings revenue and customer data together with actionable insights and automation. And what you have just seen is the new revenue cloud on, uh, Salesforce, uh, running and supporting our entire revenue lifecycle. With that, I want to pass it over to my friend TJ win, who's going to come tell us about my other favorite new product, sales performance management.

Speaker D   00:34:33

Thank you, Meredith. With sales performance management, businesses ignite seller performance from planning to paycheck. Our SPM suite is the only fully integrated solution on the market. That gives you the planning and performance data, uh, you need unified. Inside of CRM, there are three products that power this solution. They are sales planning commissions with Salesforce Spiff and finally, sales programs. Let's see these products in action with a live demonstration. How about another round of applause this time for Andy and Logan that are going to help me drive this demo. For this demo, I'm going to be playing the role of a sales operations specialist. And I start here on my sales planning homepage where I have a number of templates that I can choose from that simplify my process. Now, there's no way I can build out an entire sales plan in the next two minutes, but I'm going to show you some of the key building blocks that get us started. My first step is going to be to pull in some of my existing sales data. This could be data on our revenues, on our accounts, on our customers, and more. Once our data is in place, the next step we're going to go ahead and segment out our sales organization. We're going to segment by region, by industry, and finally by customer size. And as you can see, this is easy to do using simple rules and an intuitive UI. But next, let's build out our enterprise plan. Here I am. This page becomes my command center for my enterprise planning process. We can set territories, quotas, budgets and more. Let's go ahead and adjust our territories heading into next year. What you're seeing on the left here are our current year territories, visualized with our mapping capabilities. And on the right hand side, you can see some of our territory data. What I notice is over the course of the last twelve months, our TAM distribution across those territories has become uneven. So let's see if we can use our carving tools. To balance that out. We're going to click on optimize top right. And now I have the choice to balance my territories based on the criteria that matter to my business. We're going to select Tam, click the button. Just a few seconds later, you'll notice on the left hand side, we've now optimized our territories heading into next year based on TAM. From here, we can move on to our quota and our account planning processes. Here I am in account plans. This is a brand new sales cloud feature that comes included in enterprise edition. As a rep, I love this view. Across the top, I can instantly see the health of my account. How are my opportunities trending? What are the revenues that we've already won? What's my opportunity win rate within this account? But as we scroll down further, this is where my entire account team and I across sales, customer success, marketing. We can collaborate on account research and then align on our strategic vision for this account. And on the right hand side, what you can see is that we've set specific goals for this account and we can monitor in real time how we're progressing against them. But now for the really fun part. We all know that the fastest way to a sales rep's heart is through their wallet. But let's build out a commission's plan in Salesforce Spiffe so now I'm a global incentive compensation manager. I jump into Spiff and I can instantly see total commissions across our team. But I can also see how commissions break out by team member. But to build or adjust the comp plan, we're going to go into the SPF designer. Now. Just like with sales planning, there's no way for me to build out an entire commission's plan in 30 seconds. But what I want you to see is how

this page mimics a simple spreadsheet. We can write calculations, we can build rules, all with clicks and not code. And notice what we've done is we've added a new incentive to encourage reps to sell more long term contracts. But the problem with commissions tools on the market today is they are disconnected from where reps execute. And that's why Spiff is built right into sales cloud. As a rep on my opportunity record. On the right hand side, Spiff is telling me exactly how much money I'm going to make on this particular deal. But it's end of quarter. I know this customer is going to demand a discount. So let's see what happens to my commission after I enter in 15% off notice. My commission went down by $1,500. Ouch. That's not good. But then I remember my sales strategy team has been telling me to sell more long term deals. So I'm going to up the contract length from twelve to 36 months. And look at that, my commission went up by over $10,000 over the original amount. That's more like it. That is commissions data tied to rep execution, motivating me, the seller and driving the right, strategic behaviors. Now, of course, if I want to see my commissions data in aggregate, I can do that as well. Here in the seller dashboard, I can see my total commissions and my commissions over time, but I can also drill into specific deals and even go under the hood to see how those specific commissions were calculated. This builds transparency and trust between me, the seller, and the back office. But now my favorite part, the spiff mobile app. I can be sitting on the couch at night with my wife. I'm planning my post dreamforce vacation. I should quickly check in on how my commissions are trending and then decide, can I afford to splurge for the oceanfront suite, or is this more of a garden view type of trip? The great news is everything you just saw across Meredith and my demo r ga today, revenue cloud, sales, planning, and spiff. But next, I'd like to pass the mic back to Amber. I see she's out there with another one of our incredible customers. Amber, back to you.

Speaker G   00:40:39

Thanks so much, TJ. I am joined here with matthew Bishop, COO of Veeam. Thank you for joining us, matthew.

Speaker I   00:40:49

Thanks, Amber. And, uh, thanks for the award on behalf of the team. We're really honored.

Speaker G   00:40:54

Yeah, absolutely. Well, you've been a customer for over 15 years, and recently you challenged us to take on even more of your sales technology needs. I absolutely love that. Everything that TJ, Meredith just shared with us, you're in process of implementing. Tell us about what influenced your decision to go with a connected, complete platform.

Speaker I   00:41:16

Yeah, it's a good question. Sometimes I ask that myself.

Speaker H   00:41:19
What have I done?

Speaker I   00:41:22
Um, actually, Veeam is the ransomware recovery market leader, um, with 550,000 customers across 150 countries. Uh, not having a modern CRM is incredibly challenging in that situation. And we had so much custom code, custom apps, custom processes that actually, our CRM was an inhibitor to us becoming cloud. Ah, first consumption based solution. Bluntly, we needed a fundamental rethink. And that Rethink wasn't just about the technology stack. It was about our overall business, from getting quotes out to customers all the way through, as you've seen, paying commissions to, uh, reps. So we're really excited to be on this journey with you as our partner. We're going to re platform everything onto revenue cloud. We're going to use Mulesoft and Spiff, and it's going to underpin our, uh, journey to continue to be the ransomware recovery solution of choice across dozens of workloads. In fact, we're also an ISV partner of Salesforce. So we recover lost Salesforce data for our customers as well. And so on behalf of all our customers and from our company, thank you for being with us on this journey to reinvent ourselves.

Speaker G   00:42:42
Well, thank you so much. And I love, uh, that you've kept sellers at the center of this entire plan. For that reason. We are so excited to give you the award for simplification for sellers.

Speaker I   00:42:55
Thank you.

Speaker G   00:42:59
Let's give a round of applause to all three of our incredible award winners here. Please take a stand. Thank you all so much. We really appreciate you. And you know who else we love? We love our sales places, but we also love our awesome admins. That's right, I see some awesome admins here in the audience today and this is why we are so excited to launch sales cloud go. Sales cloud go is where admins go to increase their efficiency and it's where they go to get the greatest value out, uh, of sales cloud. Who better to describe this for us than the product leader who built it? Ben James. Ben, that is the best shape I've seen at the events. Pretty snazzy so far.

Speaker J   00:43:54
Pretty snazzy, right?

It's great.

Speaker J   00:43:55

Do we get to keep it?

Speaker G   00:43:56

Absolutely. It's all yours.

Speaker J   00:43:58

All right, everybody, you've seen a ton of innovation today and the sales cloud team has been hard at work making setup easy, which is exactly why we built sales cloud go. And I am so excited to show it to you. So let's take a look. Here is sales cloud go inside of setup. Think of this as your command center for all things sales cloud. As an admin, I get a couple key pieces of information from this page. I can track setup progress at the top. I can get AI based product recommendations, I can even see usage data. But most importantly, I can discover new products and features with our feature sets. So let's dive in. Feature sets takes all the guesswork out of it for admins by mapping a collection of sales cloud products and features to the things that we care the most about business outcomes, which in this case is all about boosting seller productivity. I even get sales blazer articles so I can learn tips and tricks from my peers that I can bring back to my organization like this one, which is all about AI and automation. But let's go back to go. I saw Einstein conversational insights at Dreamforce and I'm super excited to turn it on. I'm even more excited that Salesforce is giving me ten free licenses so I don't have to do anything to get started. So let's set it up and see where the real magic happens on, um, the feature detail page. I get everything I need to know about einstein conversational insights. As an admin, I know it's super important to dot every I and cross every t before I turn something on for my organization. This page gives me this in the form of the what, the why, and the how. With a couple key assets, I get a virtual tour at the top of the page. I get an implementation guide down on the bottom right. I even get a customer story about a fellow sales blazer like me who's successfully using Einstein conversational insights at their organization. Okay, I'm sold. Let's turn it on now. This is the part of the demo where I go deep into setup. I get lost. I give up. I say wtf? What's the following step, right? Not anymore. With sales cloud go and one click activation, I simply click the button.

Speaker G   00:46:05

And.

Speaker J   00:46:05

In a few seconds it's activated for my environment, a true confetti moment. Even better is Go outlines all the next steps for me, both required and not. So I know exactly what I need

to do next. As any good admin in the audience will tell you, the next step here is to assign the permission sets of Go makes this easy. With a contextual permission set view. It pre filters on the right permission set so I don't have to guess even pre filters on the right list of users. So with a few clicks I hit assign and I'm done. So literally in a matter of minutes I've discovered, activated and rolled out Einstein conversation insights from my organization. Pretty awesome stuff, right? There we go. Let's fast forward a few weeks. The team is absolutely hooked and we are ready to buy. Go makes this easy with self service purchasing I get all the pricing and packaging information at the bottom of the page and like any good e commerce experience, I simply add the right products to my cart and checkout and in a matter of minutes it's provision of my work. But the last thing I want to show you is the thing that admins care the most about. Adoption sales cloud Go gives me all the utilization data both at the product and at the feature level so I know what's working and more importantly what's not. So you've seen here how in literally a few minutes, go can be the blueprint for the admin and non admin alike to get the most out of their sales cloud implementation. And the best part about all of this is that it is Ga in the winter release and available in all customer orgs starting in October. Back to you Amber.

Speaker G   00:47:39

Thank you so much, Ben. Uh, so we have shared with you so much incredible innovation today, and I want you to take this picture because it all comes to life in the sales cloud fan. All of the AI, all of the tech stack simplification is right here, and, uh, it's available in 14 industries. So if you are in healthcare, if you're in finance, if you're manufacturing, we have you covered. And I know you're so excited to get your hands on all of this, so please join us in the campgrounds. Every single thing that you saw today, you can experience in campgrounds today. And before we go, there's one very last thing to share with you all. Sales Blazer is not just awards, although it's great awards, it's also incredible content. You see like this. I see a lot of you in our hoodies, so you know this already. This is content that will help you to grow your career and solve your biggest challenges. And there are over 300,000 sales blazers connected through the sales Blazer community. We just launched our slack community. So get out your phone, scan the QR code, and join us. And finally, a tremendous thank you to all of you for joining, uh, us today. We are so grateful for your time and energy, and we hope we've excited you about what you can do today as well as what's coming in the future. Thank you, everyone.

Speaker F   00:49:21

Hey, trailblazers. Thanks for joining us.

Speaker B   00:49:23

We'd love your feedback.