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salesforce

Guidebook

# Data Cloud:
# The Ultimate Guide

Learn how Salesforce Data Cloud unifies data
to power your AI-driven use cases...

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# Building a data foundation for tomorrow.

In today's data-driven world, businesses are continuously seeking ways to harness the power of their data for smarter decision-making and enhanced customer experiences. It's not just about how much data you have, but how effectively you use it. This is especially true in a time where AI-driven solutions and innovations are disrupting business paradigms.

Enter Salesforce Data Cloud — a comprehensive platform that goes beyond traditional customer data platforms (CDPs) to offer a unified, 360-degree view of your customer data across all areas of your business.

This Guidebook will show you how Data Cloud unifies and harmonizes huge amounts of diverse business data with CRM data from the Salesforce Einstein 1 Platform, providing businesses with an unparalleled view of their data universe and a sturdy foundation for better customer experiences powered by AI.

# What's in this Guidebook?

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## Chapter 1

# Data silos are holding your teams back

Remove data silos to unlock value from
your trapped data with Salesforce Data Cloud.

# Is your data estate fragmented?

In many companies, small and large, customer data is spread across multiple applications, ERPs, data warehouses, and data lakes. Data silos, accessible only to specific departments, don't only limit your operational effectiveness — they lead to missed business opportunities and lost clients.

To overcome the disadvantages of data silos, organizations need a holistic approach to data management, one that creates a unified view of every important data point in the business.

And even though a unified data foundation is necessary, it is not the end game. To realize the full potential of your data, it needs to be accessible to everyone in your organization in their everyday flow of work.

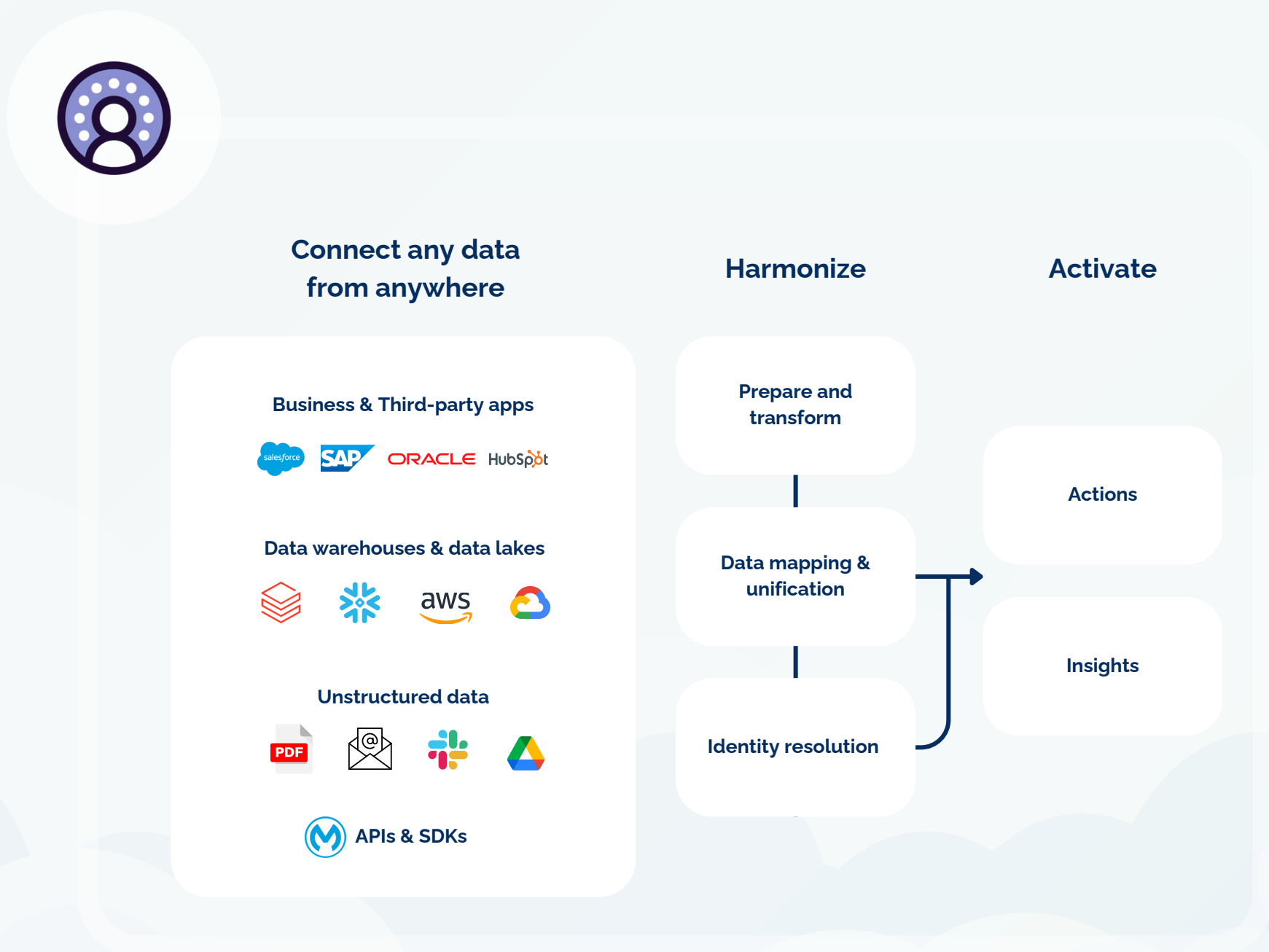That is where a unified data activation strategy with **Salesforce Data Cloud** comes into play...

## Chapter 2

# What is Salesforce Data Cloud?

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# What is Data Cloud?

Salesforce Data Cloud brings together all your trapped data, no matter where it lives, so you can activate your data from one central location.

It is a comprehensive data platform designed to connect and aggregate data from various systems, transforming it into valuable insights. It provides your business with a unified, 360-degree view of your customers by consolidating data across different teams and departments.



**Connect any data from anywhere**

**Business & Third-party apps**

salesforce    SAP    ORACLE    HubSpot

**Data warehouses & data lakes**

**Unstructured data**

PDF

APIs & SDKs

**Harmonize**

Prepare and transform

Data mapping & unification

Identity resolution

**Activate**

Actions

Insights

**Chapter 3**

# Why Salesforce
# Data Cloud?

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# Why companies use Data Cloud?

Salesforce Data Cloud brings together all your trapped data, no matter where it lives, so you can activate your data from one central location.

It is a comprehensive data platform designed to connect and aggregate data from various systems, transforming it into valuable insights. It provides your business with a unified, 360-degree view of your customers by consolidating data across different teams and departments.

## Unified views of data

Combine company demographics, financials, hiring information, web traffic, product usage, marketing data, and more into unified views to gain a complete picture of your prospects, deals, and forecasts.
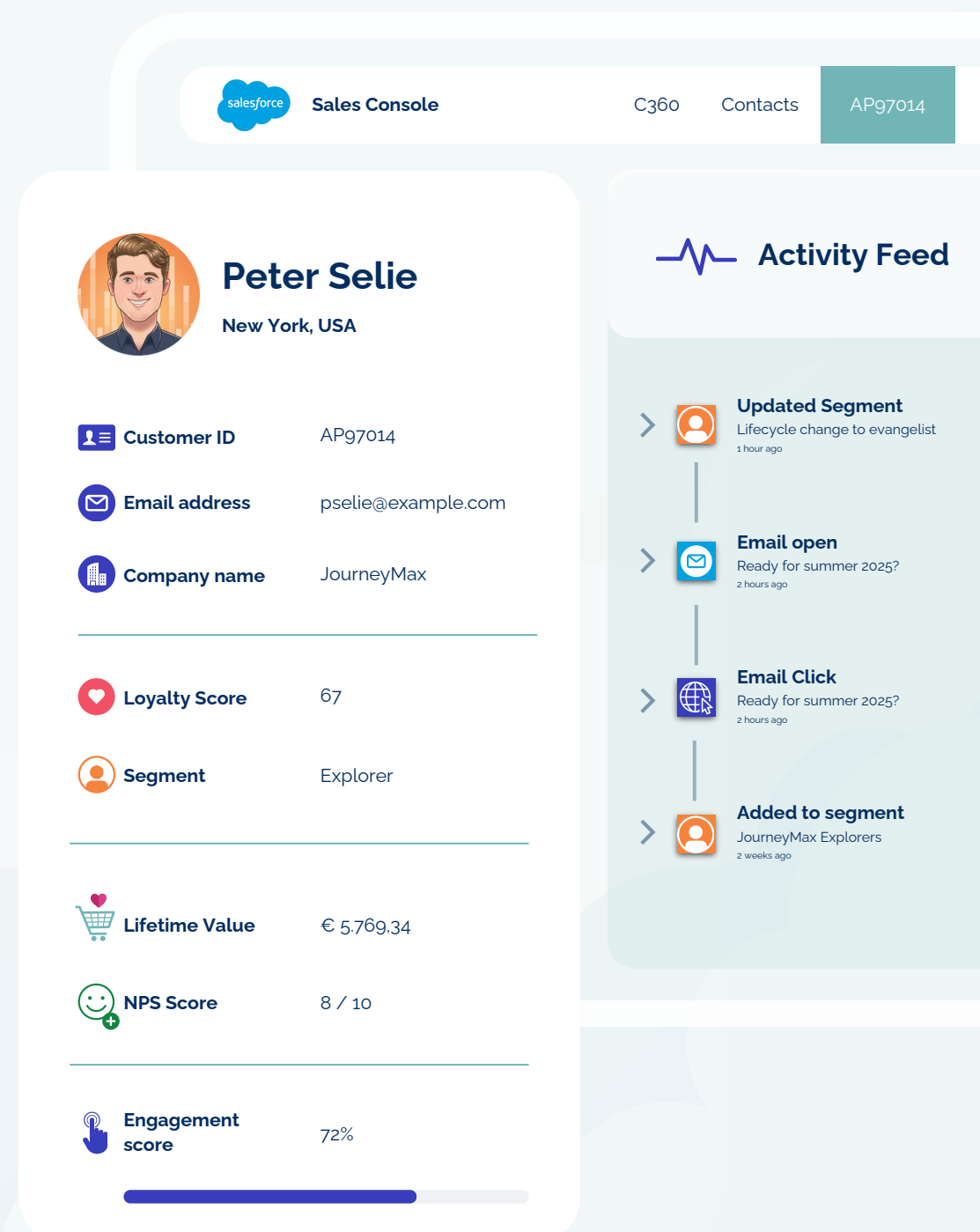
## Data Harmonisation

Standardize and merge sales data from various systems into a consistent format, to enhance data organization and relevance.

## Integrate with all business apps

Integrate data securely using prebuilt connectors to consolidate data across multiple Salesforce environments, your website, ERP systems, data lakes and warehouses, and other data sources directly into Data Cloud.

## Zero-copy

Virtually access data across your data lakes and warehouses like Snowflake without duplicating it, ensuring data integrity and security.

salesforce **Sales Console**     C360    Contacts    AP97014

**Peter Selie**
New York, USA

| | | |
|---|---|---|
| Customer ID | AP97014 |
| Email address | pselie@example.com |
| Company name | JourneyMax |
| Loyalty Score | 67 |
| Segment | Explorer |
| Lifetime Value | € 5.769,34 |
| NPS Score | 8 / 10 |
| Engagement score | 72% |

**Activity Feed**

> **Updated Segment**
> Lifecycle change to evangelist
> 1 hour ago

> **Email open**
> Ready for summer 2025?
> 2 hours ago

> **Email Click**
> Ready for summer 2025?
> 2 hours ago

> **Added to segment**
> JourneyMax Explorers
> 2 weeks ago

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## Chapter 4

# How does
# Data Cloud work?

# How does Data Cloud work?

## Activate

| Customer 360 | Segmentation | Insights | Workflows | AI Activation |
| --- | --- | --- | --- | --- |

### Unify

MuleSoft · Data · Sales · Service · Marketing · Commerce · Analytics · Platform · Slack · Tableau · Canvas (Quip) · Heroku

Einstein

## Harmonise

| Data spaces | Data models | Data mapping | Customer graph | Identity resolution |
| --- | --- | --- | --- | --- |

## Connect & Prepare

| Out-of-the-box connectors | Mulesoft | Streaming & batch ingestion | Data bundles | Streaming & batch transformations |
| --- | --- | --- | --- | --- |

## Data Sources

### Third party

- Microsoft Azure
- Snowflake
- Amazon Redshift
- Google Cloud
- Google BigQuery

Customer 360
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APIs & SDKs

Mobile & Web

Legacy systems

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# How does Data Cloud work?

## Connect & prepare data from every data source

The first thing to know is that Salesforce Data Cloud is open.

So, regardless of where your data comes from - internal software, marketing channels, external data lakes, emails or even PDFs - Salesforce Data Cloud can bring all the dots together.

This includes all types of data from web & mobile, to third party data, and legacy systems. With a variety of pre-built connectors, you can easily integrate with all the products in the Salesforce Customer 360.
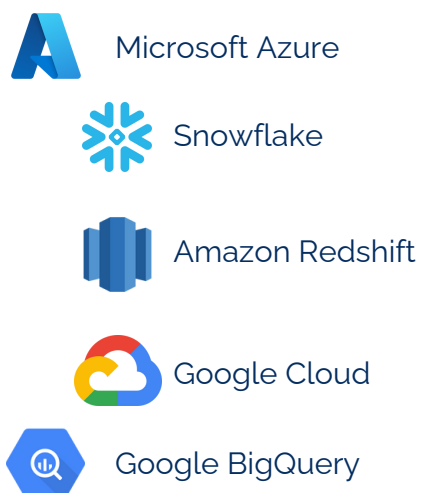
When it comes to external systems outside of the Customer 360, there's the MuleSoft library of connectors to help you seamlessly connect to the right data sources in Data Cloud.

And it gets even better...

Thanks to Salesforce Data Cloud's open, extensible architecture, you can also integrate with other cloud providers like Google Cloud, Snowflake & Databricks too - employing zero-copy integrations that allow seamless connection to your data. No need to move or copy your data there.

**APIs & SDKs**

**Mobile & Web**

**Legacy systems**

**Customer 360**

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**Third party**

Microsoft Azure

Snowflake

Amazon Redshift

Google Cloud

Google BigQuery

# How does Data Cloud work?

## Harmonise & unify your data in Data Cloud

Okay, with all your data connected to Data Cloud, how do you build that single source of truth based on harmonised and unified data?

Difficult question. But the answer is pretty simple, actually.

Since Data Cloud is built on Salesforce, you're able to leverage the ability of integrating all your data into the standard Salesforce metadata model. Once your data is integrated into the model, you can access that data in all the different business apps of the Salesforce Customer 360 - like Marketing Cloud, Sales Cloud, Service Cloud, etc.

To design Data Cloud, Salesforce engineers also leveraged Apache Iceberg - which is an open source high-performance format for huge tables. This gives Data Cloud the ability to combine CRM data with data from a variety of other sources.

Think transactional data, customer behaviour data, IoT device data, and even unstructured data like social media post engagement, etc. By bringing all these data points together in one place, Data Cloud allows that creation of your single source of truth - making your data ready to be activated for a wide range of business purposes.
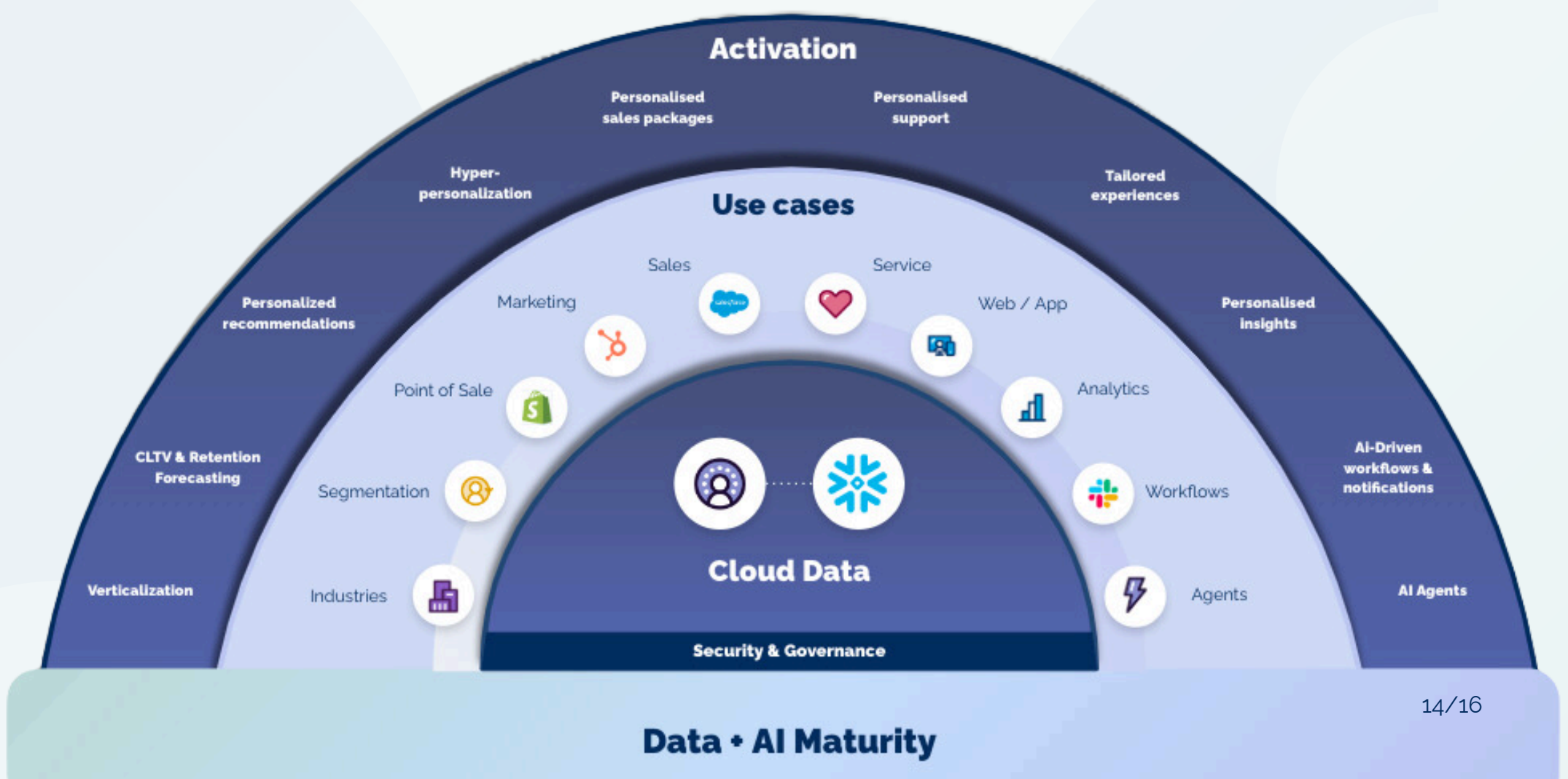
# How does Data Cloud work?
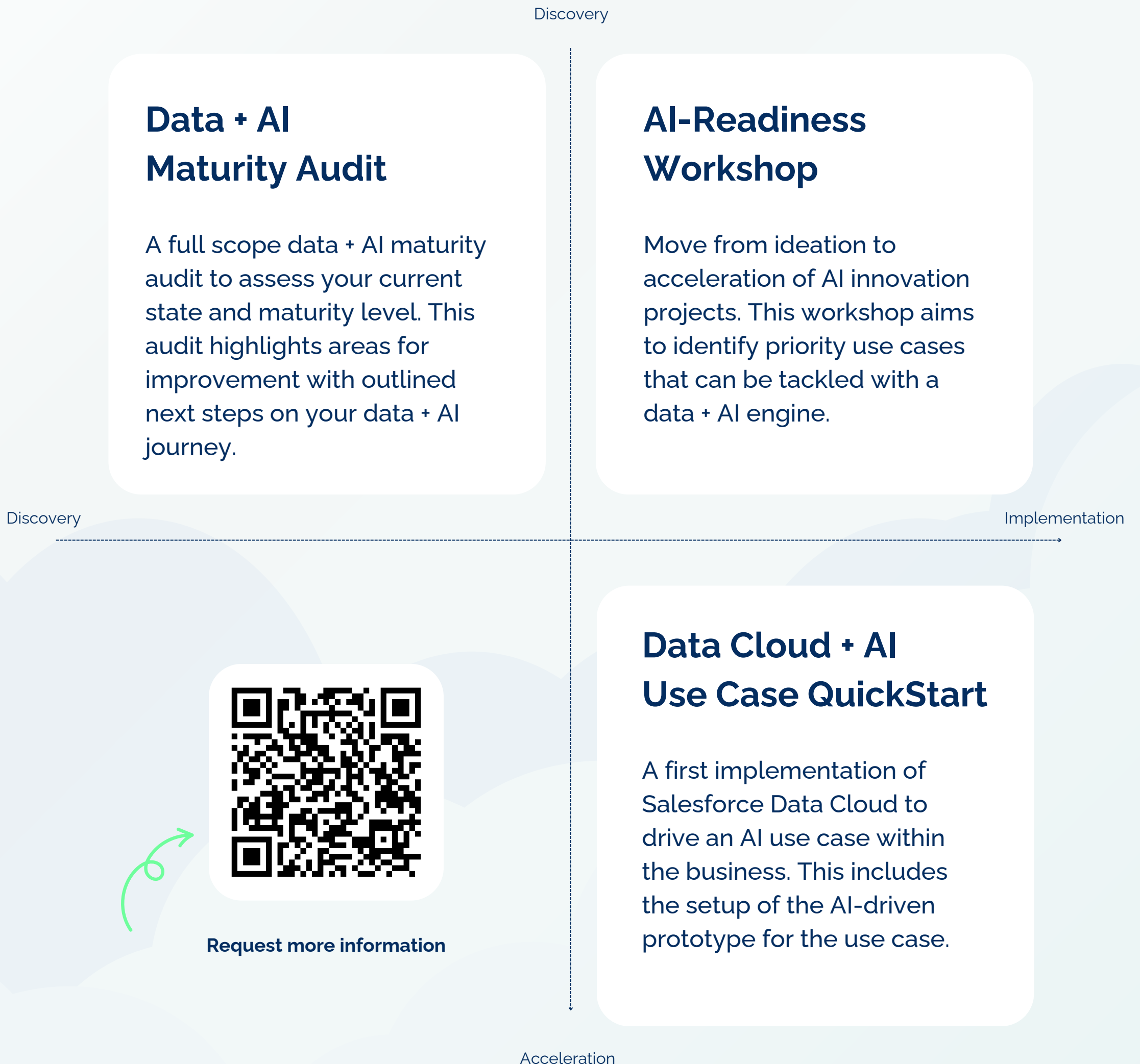
## Activate your data with data cloud

So with all your fragmented, hard-to-use data scattered across the business now being unified and harmonised in Data Cloud, the next step is to activate that data.

Data activation could mean; building data-driven automations, enhancing business processes, enabling data-driven decision making or driving AI innovation projects in the organisation.

## Data + AI Engine

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# What's the next step on your data + AI journey?

Discovery

### Data + AI Maturity Audit

A full scope data + AI maturity audit to assess your current state and maturity level. This audit highlights areas for improvement with outlined next steps on your data + AI journey.

### AI-Readiness Workshop

Move from ideation to acceleration of AI innovation projects. This workshop aims to identify priority use cases that can be tackled with a data + AI engine.

Discovery                                    Implementation

**Request more information**

### Data Cloud + AI Use Case QuickStart

A first implementation of Salesforce Data Cloud to drive an AI use case within the business. This includes the setup of the AI-driven prototype for the use case.

Acceleration

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