Playbook

Data + AI
Activation for Sales

How to close deals faster
with actionable data & AI in Salesforce...

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Chapter 1

What is data + AI activation?

Data + AI activation refers to the process of making data available, and operationalising it within AI-driven use cases for sales teams. This involves unifying and harnessing all your customer data into a central CRM system, allowing your sales team to access and utilise this data in their everyday workflows. Think of data like:

Prior sales data to understand buying patterns & frequencies.

Consumption data to track usage and engagement to increase retention.

Billing & subscription data from ERP systems to track renewals & billing cycles.

Unstructured data like PDFs, emails, etc to get an even more holistic view.

Customer service data to get an overview of any issue or complaints from customers.

Marketing campaign data to align sales with marketing efforts even further.

Web engagement data to understand customer behavior so you can improve strategies.

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Chapter 2

Why data + AI activation?

By breaking down data silos, your sales team can achieve a holistic view of their prospects, customers, accounts, and sales opportunities, thereby transforming their sales operations.

Data activation means bringing all that unified customer data securely together into your CRM, where your sales teams can use it in AI-driven workflows or other applications that directly interact with your customers and prospects. And that can lead to some powerful benefits for your sales team.

Better customer engagement: By delving into unified customer data directly within your CRM, you gain richer insights into your customers' behaviours and preferences. Acting on these insights enhances your engagement, aligning your responses with your customers' true needs.
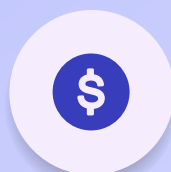
Increased sales efficiency: With all your necessary data and smart analytics consolidated in one accessible spot, you can streamline your sales decision-making and strategically position your sales teams for maximum impact and optimal deal closure.

Shortened sales cycles: Unified data provides instant access to all the information you need to quickly seal your deals. The faster you reach an agreement with your customers, the sooner they can start benefiting from your products and services.
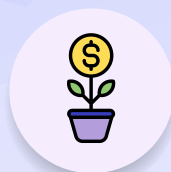
Increased win rates & revenue growth: Boosting win rates and revenue growth is directly achievable through data-informed sales tactics, which lead to higher conversion rates and increased customer satisfaction. Ultimately, this results in elevated revenue figures.

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Chapter 3

Use cases:
Data + AI for Sales

How data + AI activation
drives sales success

Discover and increase cross-sell and upsell opportunities

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Use Case Context
In this fictional use case, you're running the sales department of a regional Leisure Travel company named JourneyMax which offers tailored travel packages and experiences to individual consumers and groups.

The Challenge
As the Sales Manager of JourneyMax, you're faced with significant difficulties in effectively utilising the company's disconnected data sources, including online sales, customer loyalty programs, and in-store transactions. This fragmented data estate hinders your ability to personalise marketing efforts and efficiently target upselling and cross-selling opportunities to your existing customer base.

The Solution
To address these issues, your organisation adopted a centralised data activation approach. Through a **Salesforce Data Cloud** implementation, your company can now integrate data from billing and subscription records, web engagement logs, and third-party systems into its CRM system.

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How JourneyMax activates data + AI

Identifying future booking opportunities through structured data analysis: By leveraging booking records and payment histories stored in your CRM system, your sales team can conduct detailed analyses of previous customer transactions to discern patterns in travel preferences and spending behaviours.

Customising travel package recommendations through unstructured data analysis: By evaluating web engagement logs and social media interactions, JourneyMax Travel uncovers valuable insights into their customers' preferences and travel behaviours. The marketing team leverages this information to suggest travel packages and experiences that resonate with the individual histories and current desires of their customers, thereby enhancing satisfaction and driving increased bookings.

Focusing on high-value travellers through transaction history analysis: Structured data, such as past booking details and payment records, enables JourneyMax's sales teams to assess the potential value of each customer. This analysis helps in identifying those travellers who are more likely to be interested in premium packages and additional services. By prioritising these high-value customers for upselling and cross-selling opportunities, your team can allocate their resources more effectively, ensuring a targeted and efficient approach to sales.

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Business Outcomes for JourneyMax

Boosted Revenue: By customising their marketing efforts to target customers who show the greatest likelihood of interest in premium upgrades and additional services, JourneyMax's sales team significantly increases the company's revenue.

Enhanced Sales Productivity: By strategically directing their efforts towards the most promising leads, JourneyMax's sales teams operate more productively and efficiently, optimising their resource use and maximising output.

Use Case 2

Close deals faster
with AI Agents

Use Case Context
In this fictional use case, you're running the sales department of a global tech company with multiple sales divisions around the world.

The Challenge
With multiple divisions around the world, each one operates independently and has their own Salesforce org. The goal is to build AI Agents to help your sales teams make better business decisions and drive more efficient sales operations.

However, with the disconnected data sources and extensive amounts of data being collected, it's hard to know where to start.

The Solution
The solution is similar to use case 1. An implementation of Data Cloud where all data is harmonised and unified, will help build the right data foundation for AI activation.

The company uses Data Cloud to bring data from all the Salesforce orgs and ERP systems into one Salesforce instance. It integrates consumption and web-tracking data in the same instance. After the data is cleansed of errors, inconsistencies, and duplications, it forms the foundation the company needs for effective analytics and predictions powered by AI.

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Use Case 2

How to activate data + AI

Identify and prioritise quality prospects: An AI Agent for sales can now use this data to prioritise which prospects to target, when, and with which offers.

Improve forecasting accuracy: AI Agents can analyse combined datasets, including sales, billing, and customer usage patterns, to generate accurate sales forecasts and operational insights. With better visibility into customer behaviour, sales teams are motivated to close more deals.

Set proactive AI alerts for better sales engagement: The sales team decides to put AI to work here, too. Data such as customer interaction history, sales pipeline details, survey responses, customer support tickets, and product usage and engagement metrics is fed into AI, which creates alerts for at-risk deals. The sales team can then adjust their sales strategies to address potential risks quickly. By reaching out to customers and addressing their concerns in a timely manner, the sales team can close deals that were previously at risk.

Personalise deal plans: With the help of AI, the sales team uses data-informed insights and predictive analytics to identify key customer segments and their specific needs quickly and more accurately.

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Use Case 2

Business Outcomes for Data + AI

Better decisions: AI-driven insights about customer preferences and risks give the sales reps the tools to make better decisions and close deals faster.
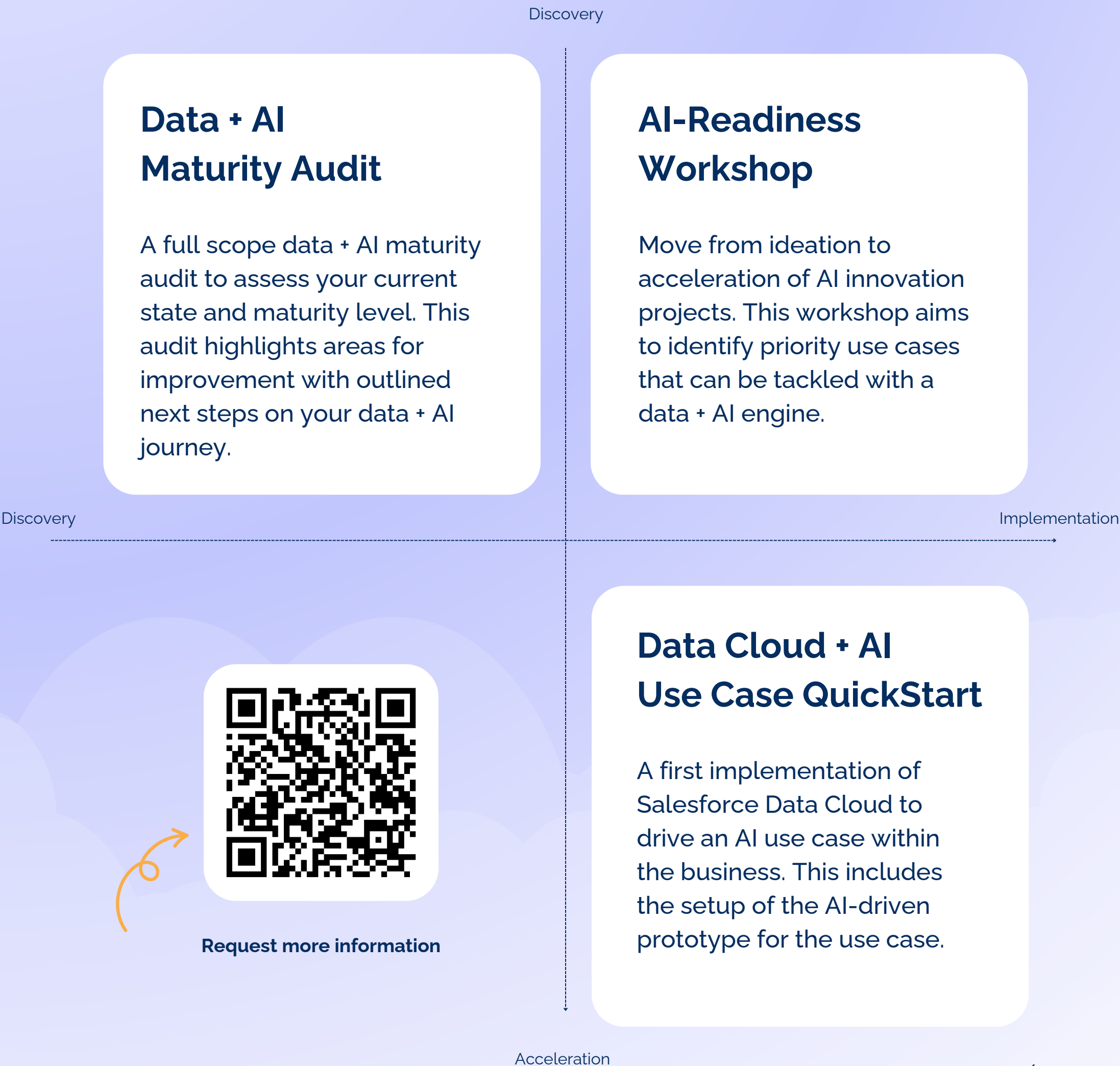
Increased sales efficiency: Personalized AI-driven deal plans and proactive risk management drives up sales productivity and efficiency.

Better risk mitigation: AI-generated risk alerts and recommendations lead to better and quicker risk mitigation, which helps close more deals faster.

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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

Read the full

blog

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