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Envisioning a Unified Sales, Service and Marketing Experience using Salesforce CRM

White Paper

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CRM is King in Today's Customer-Centric World

There's no denying that in today's business environment, enterprises are competing for customers' attention and loyalty like never before. Apart from product and service differentiation, customer experience has become a key determining factor in order to stand out in today's competitive market. Yesterday's incumbents who continue to retain leadership owe it largely to a culture of customer-centricity and uninterrupted value-add. And disruptors who are fast gaining ground are even more reliant on customer experience quality as part of their core proposition.

In other words, modern enterprises simply cannot take their customers for granted and must continually look at reinforcing existing relationships, even as they forge new ones. This places Customer Relationship Management (CRM) systems at the top of the enterprise technology stack. **According to Gartner, the global CRM software segment grew by 15.6% in 2018, the largest and fastest-growing category among enterprise users. Looking at revenues, the criticality of CRM is even clearer – of approximately \$193.6 billion in revenues from enterprise software, CRM comprises nearly a quarter.**

So, what makes CRM a vital component of enterprise operations? This can be attributed to four broad trends:

New channels of engagement

Digitalization has introduced a plethora of new channels that are frequented by insurance customers. Interfaces such as social media, email, conversational tools, etc. hold immense opportunity for insurers to drive customer reach. A CRM can integrate all of these channels into a unified pipeline, allowing a customer who engages with the company on social media and compares policies on online aggregators, to complete the purchase using a messaging app.

The power of big data and analytics

To support multichannel engagement, enterprises are now looking to leverage big data and advanced analytics. Information across the customer journey, both quantitative and qualitative, can be aggregated on a single source of truth in order to generate deeper insights. These are fed into an automation engine that refines the customer journey, bringing in the all-important element of personalization.

Fierce competition

BFSI is fast becoming a crowded segment, characterized by industry monoliths on the one hand and niche players with a clearly segmented audience on the other. Converting customers and swaying them away from the competition could prove exceedingly difficult. On the flip side, businesses that are able to combine compelling products with an engaging narrative will gain a definitive advantage.

Changing expectations

In an increasingly consumerized universe, customer expectations from their service providers are undergoing a sea change. They are no longer satisfied with only the basic provisioning of products – the entire journey, from research to purchase and support, must leave a lasting impact. This is made even more complicated with the introduction of e-commerce. Given the convenience of e-commerce and online product exploration, brick-and-mortar stores are struggling to meet experiential requirements, regardless of their vast physical footprint.

As a result of these factors, it is now essential to ensure a seamless customer journey, maximizing value at every touchpoint. A CRM system that has emerged as an industry favorite is Salesforce.

02



How Salesforce Could Address Critical Challenges in CRM

When it comes to CRM, Salesforce is a clear industry leader, both in terms of market share and total revenues. In 2018, it occupied a whopping 19% of market share. The company's continued success can be attributed to its keen focus on innovation and next-gen digital technologies. These include Salesforce Service Cloud, Salesforce Marketing Cloud, as well as the AI & ML engine, called Einstein.

Salesforce Service Cloud is a cloud-based customer support platform that lets businesses offer customer service any channel. It can be deployed either independently or in conjunction with Marketing and Sales Clouds, creating a continual data flow. Marketing Cloud is probably the most relevant component for enterprises with a plethora of features such as campaign management, data management, customer journey builders as well as studios for email, social media, interactions and mobile campaigns. All of these tools are augmented by the power of Salesforce's AI & ML tool 'Einstein.'

Artificial intelligence has reached a point in which systems can have increasingly engaging and human-like conversations. When combined with a robust CRM platform, companies can leverage this wide-reaching technology to empower agents and engage with customers in new ways. With Service Cloud Einstein, one can automatically unlock customer insights in

real-time--to deliver a transformational customer service experience, and it's seamlessly baked into your existing Service Cloud deployment. Einstein intervenes at key moments to help marketers make better decisions – for example, in the email studio, Einstein will recommend the ideal subject line and communication frequency, in line with customer behavior. Einstein is a powerful tool that makes customer smarter and more effective, which translates to a seamless service experience.

Redefined customer support for an American video game publisher

Zensar implemented an end-to-end Salesforce Service Cloud solution with Service Console and Live agent, achieving a 15% reduction in average handling time and 25% uptick in C-SAT.

Salesforce suite of applications transforms how enterprises design, navigate, and enhance customer journey for the highest possible conversion rates, retention, and lifetime value. Some of the key challenges addressed are:

- **Dependence on one-size-fits-all models** - Salesforce makes it possible to delve deeper into individual customer behavior, approaching them as segments of one. This lets enterprises hyper-personalize each experience and guide a prospect towards the purchase stage.
- **Lack of a comprehensive customer view** - Operating independently, marketers, sales executives, and support staff would have different perspectives of the customer, informed by siloed data. Salesforce brings all of this together to build a coherent customer narrative, reflected in a 360-degree customer view.
- **Dissonance in offline to online tracking** - This is among the key use cases for brick-and-mortar retailers, as a significant portion of their business continues to happen offline. Once they enter a hybrid environment, operating via both digital and physical assets, offline to online conversion tracking becomes imperative. Even digital-native players are eager to use Salesforce to understand how their offline marketing activities translate into bottom-line improvements.
- **Lack of standardization** - It's important to remember that a CRM doesn't work in a vacuum. Datasets from enterprise servers, inventory and product information, supply chain processes, and the like, must seamlessly intersect with CRM. Salesforce addresses this by integrating with the larger enterprise ecosystem, working towards a shared business goal.

Done right, an end-to-end CRM built on Salesforce could help enterprises achieve a competitive business advantage and enhance customer experiences like never before. Unfortunately, the data required for providing unified customer experience typically exists in silos. It might be possible for small businesses to maintain rudimentary spreadsheets populated with customer data, and plug this into Salesforce. But for large enterprises working through diverse brand and product portfolios, this typically leads to a highly fragmented landscape. As a result, they are required to spend excessive time and effort on configuring in-house databases for Salesforce, as well as from consuming, synchronizing, maintaining, and updating them. It also takes extra effort to introduce a new data source.



03



An Integrated Service-Marketing-Data Lake Architecture

Salesforce is paving the way to help enterprises build a connected ecosystem of data, processes, and applications across Sales, Service, and Marketing. Using Salesforce Marketing Cloud connectors, it is possible to envision a next-gen data architecture that automatically draws information from enterprise systems (updated in real-time) and feeds directly into Salesforce Marketing Cloud. This results in a seamless, automated, and time & cost-effective CRM and Marketing function, designed for scalability. As businesses look at expanding their footprint across new geographies, backend integrations like this could prove to be game-changers.

Zensar's integrated data lake architecture will comprise six vital building blocks:

1. Non-real-time source systems that retrieve historical customer data in nightly batches
2. Data governance and management to clean, de-duplicate, and transform datasets to be stored in the master data management platform
3. A single view of the customer to feed data into Salesforce, either on a real-time or historical basis depending on business needs
4. Real-time source systems, for example contact center interfaces that are regularly updated in contrast to enterprise ETL (Extract, Transform, Load) that follow daily/weekly/monthly update cycles
5. A Hadoop-based data lake comprising a historic data mart with a one-day latency and real-time "sliding windows," updated at 15 minutes or one-hour intervals
6. A cloud integration platform such as MuleESB or SnapLogic, used in conjunction with an API gateway to connect with the Salesforce instance

By going beyond traditional, siloed systems and adopting this unified approach, enterprises will be able to achieve several benefits

- **Granular Visibility** - Singular customer persona across channels
- **Personalized Customer Journey Maps** - Stakeholders can drill down into each step of the customer journey, leveraging the insights gained to inform future decisions.
- **Automated Workflows** - Instead of a one-size-fits-all model, insurers, banks and manufacturers can configure multiple automated workflows based on customer triggers and behavioral traits. This will ensure that each lead is carefully nurtured towards conversion. Once these workflows are in place, they can be reused across campaigns, brands, and regions, reducing the time & effort required to generate value from customer engagement initiatives.
- **Better ROI on Campaigns** - The returns from each campaign would also witness an uptick, as CRM decisions are now based on a unified data perspective, and not on an incomplete/incoherent view.
- **Pre-Built Integrations** - This is the most compelling benefit for large banks, insurers and manufacturers - there's no need for in-house data management expertise, as the architecture will be ready-to-deploy, powered by pre-built integrations.

04

Steps Towards Building a Unified Salesforce Function

This new Salesforce solution architecture stands on a foundation of robust and cleansed data, informing every decision and business rule. For marketing automation to be truly effective and scalable, businesses must first prepare the landscape for implementation. This involves:

Enhanced revenue generation for an Australian supermarket chain
Zensar deployed a unified Salesforce landscape to address key use cases, including online/offline tracking, private sales, shopping lists and pre-ordering.

Setting up the infrastructure - The infrastructure would comprise multiple layers where data will be temporarily stored, curated, archived, or consumed.

Analyzing source systems - Historical and real-time source systems must be accurately analyzed using data science models, as per specific CRM use cases.

Creating data models - Large manufacturers, insurers and banks need to look at location and brand-specific data models to micro-target customer relationship activities; this will work in conjunction with a unified data model across the enterprise.

Ensuring data quality - Through data framing, technical design, and continuous improvement, enterprises can ready their datasets to be processed by the plethora of Salesforce components available and in-use across verticals.

Offering a business view - This must be comprehensible to non-technical users; stakeholders across the enterprise would use business intelligence dashboards to gain real-time and historical reports on customer experience quality.

Exploring AI & ML integrations - AI & ML layers should strategically be interpolated into the CRM data module, leveraging the power of Einstein, to optimize tasks.

Reinforcing the integration platform - The cloud integration platform responsible for driving integration should be carefully selected, considering next-gen middleware options such as MuleSoft.

This would be able to transform customer experiences in several scenarios. Given the dynamic nature of purchase journeys in today's digital world, a unified sales, Service and Marketing functions will help to remove fragmentation, tap into latent demand, and convert unique customer behavior into measurable profitability. For example, a customer who wishlists an out-of-stock product online can be notified about its availability when he steps into a brick-and-mortar outlet of the same brand.

AI & ML can also leverage historical data to curate a list of "exclusive customers" with high potential lifetime value. Private promotional campaigns can be designed around this segment, garnering high ROI from selective investments. Another area where a unified Salesforce instance could help is in creating shopping lists complete with where-to-buy and product literature.

The Salesforce Journey Builder will notify customers when a new product in their interest area is added to the catalog, or when someone reviews a product on their shopping list. Finally, pre-ordering is a promising use case where a unified data architecture-driven Salesforce platform comes into play. Historical purchase behavior combined with website browsing patterns will auto-notify customers of pre-order availability.

Better UX for a Switzerland-HQed consumer electronics company
Zensar streamlined the implementation of Salesforce Service Cloud to enhance customer engagement, achieving a reduction in case turnaround time as well as 30% savings, led by smart integrations.

Zensar is Positioned as a Premier Partner on this transformation journey

Zensar has successfully driven Salesforce implementations for global customers, catering to the use cases discussed above, among others. We are a Salesforce Partner, with 250+ Salesforce-certified consultants. With several clients in the retail, BFSI and Manufacturing domains, our solutions have been critical in transforming CRM outcomes and driving growth.





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For more information please contact: velocity@zensar.com | www.zensar.com