

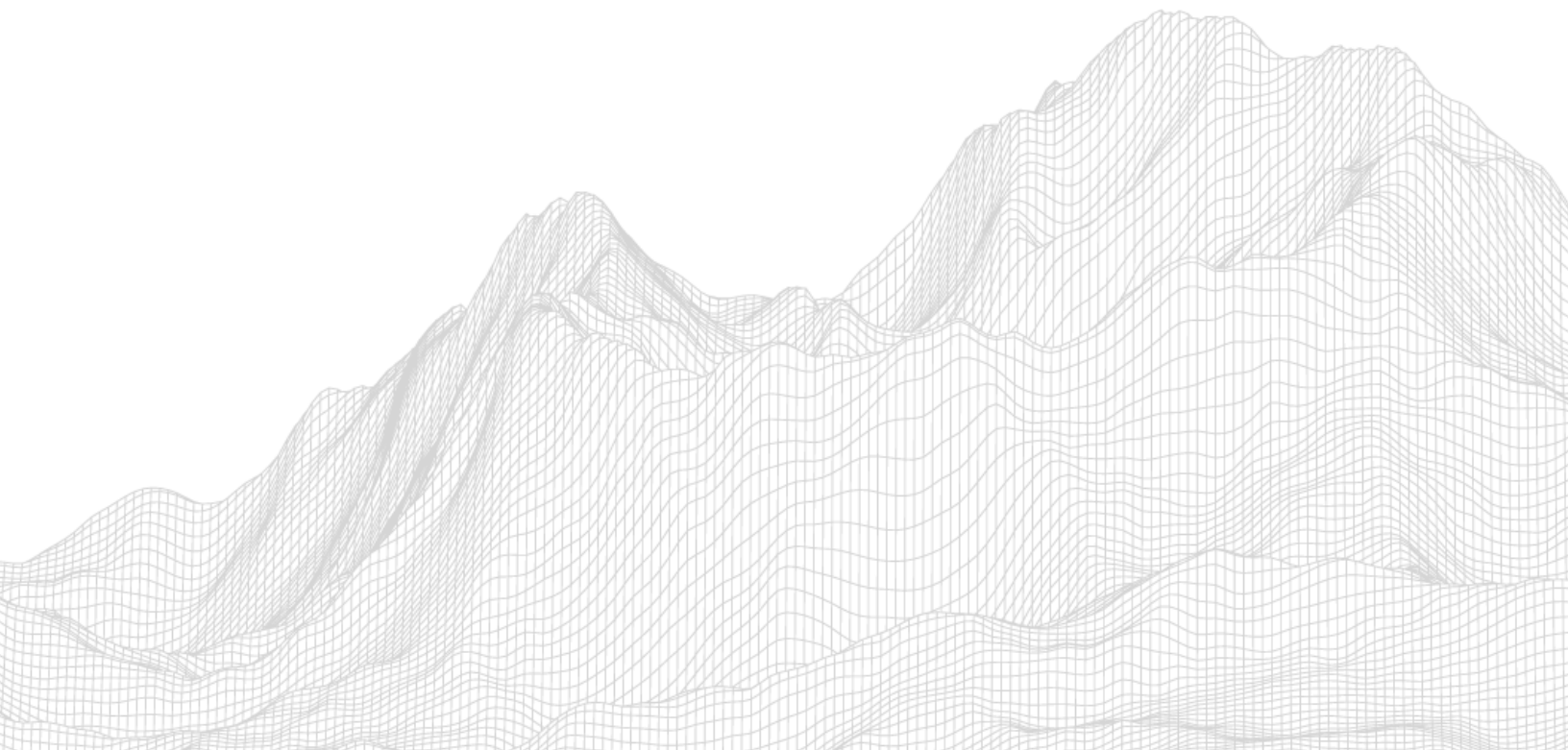


# **GUIDE:**

Building Your Data  
Strategy for AI with  
Salesforce Data Cloud

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## The Power of Data Lies in Data Unification

How many places do you need to go to find the data you're looking for in any given scenario? If the answer is more than one, that's too many.

For more than a decade now we've spoken about data as the lifeblood of business: It fuels better decision-making, more accurate forecasts, increased efficiency to fix issues, and the list goes on. But all this data is only as good as it is accessible and contextual.

In short, it's not just having data that's so important, it's unifying that data across sources that makes it truly valuable.

Why exactly does data unification matter so much? Having a single source of truth for all data:

- **Ensures consistency and accuracy** across systems and departments
- **Provides a comprehensive view of business operations**, customers, and market trends for better strategic planning, resource allocation, and performance optimization
- **Delivers a holistic view of customer interactions**, preferences, and needs to power more personalized engagement
- **Streamlines data management processes** to improve operational efficiency and enable deeper, more accurate reporting and analysis
- **Facilitates compliance with data privacy regulations** and governance policies by providing visibility and control over data usage, access, and security
- **Offers more context** for machine learning and artificial intelligence to help identify new opportunities, optimize processes, and drive innovation more effectively

# 94%

**of business leaders feel their organization should be getting more value out of its data**

[- Salesforce State of Data and Analytics Report](#)

Quite simply, data unification is the only way to unlock the full potential of your organization's data – which in turn leads to better decisions, improved customer experiences, and overall operational excellence. So how exactly do you get to that point? Read on for everything you need to know to get started.

## Building Your Data Strategy

First thing's first: You need a data strategy.

A data strategy supports best-in-class data architecture and ensures you manage data consistently. To do so, it looks at data storage formats, data access rights, system connections and data governance. It also considers the purpose of collecting and storing different types of data and keeps an eye toward how data will be used for analysis.

Ultimately, this strategy should answer the question: How does your organization collect, organize, and manage data? A well-defined data strategy not only takes into account your company's goals, but it also positions data as a strategic asset for future growth.

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All of this is essential at a time when

# 92%

[of analytics and IT decision-makers say trustworthy data is needed more than ever.](#)

**“Data Cloud continues to transform how Retail and Consumer Good brands understand and engage customers. The data journey is complex, so it’s critical to leverage a partner like AllCloud with extensive data and industry expertise to harmonize and activate data across all touchpoints.”**

**- Rob Garf, VP and GM, Retail and Consumer Goods, Salesforce**





Specifically, as you map out your data strategy it's important to:

- **Define your business goals and relevant initiatives:** Align on which goals and initiatives the data program and its strategy will support. Keeping these goals top of mind is essential to making sure your program has a clear and consistent direction and success measures.
- **Identify your team:** Assemble a team from across the business to lead the data strategy and make critical decisions. This group should represent various perspectives and be responsible for setting the strategy, assigning roles and responsibilities, troubleshooting data issues, and communicating progress.
- **Introduce data governance:** Determine how your organization will handle data at all times. This includes how you will think about regulatory compliance, quality assurance, and ongoing security, as well as how data will be managed throughout its lifecycle.
- **Establish your data architecture:** Procure the infrastructure to support your data initiatives. Along the way, you'll need to pay attention to data flow, storage, processing, and accessibility. This is also where you'll determine a source of truth for your aggregated data.
- **Pay close attention to data integration:** Establish standards for how data will flow from various systems to your source of truth. It's important to think about how often data will move between systems, the direction(s) in which data can flow, and who can access various systems.
- **Support data lifecycle management:** Introduce processes to maintain data quality at all times. This includes everything from data acquisition to storage and analysis to archival. These processes are essential to maintaining trust in data at all times.
- **Measure and communicate results:** Keep a close eye on program performance to make sure you're achieving the defined objectives. Regularly measuring progress toward goals can also help identify areas for ongoing improvement in your strategy and overall efforts.

**The bottom line: A well-defined data strategy lays the foundation for using data as a strategic asset. It provides the guardrails and oversight to ensure quality and accuracy, that way your team can use data effectively to drive innovation and growth.**

Data-driven organizations are

**23x**

more likely to  
acquire customers

**6x**

as likely to retain  
customers

**19x**

as likely to be  
profitable

- [McKinsey Global Institute](#)

## Bringing AI Into Your Data Program

Taking advantage of AI is no longer a futuristic ideal, nor is it simply a passing trend. Bringing AI into your data program can help you better understand your customers and support their needs proactively – thereby delivering big wins around new sales, cross sell and upsell opportunities, and ongoing customer retention and loyalty.

### But what does it take to bring AI into your data program?

Having the right technology alone doesn't deliver those game-changing insights. Your data strategy also plays an essential role. For proof, look no further than the fact that organizations with high data maturity are twice as likely to have the high-quality data needed to use AI effectively, [according to Salesforce's State of Data and Analytics Report](#).



Your data strategy will lay the foundation for a successful AI implementation by supporting key considerations like data quality, accessibility, governance, scalability, and collaboration:

- **Data quality:** Good, clean data is a must. That's because your data will be used to train AI models, and as the saying goes: "garbage in = garbage out." Inaccurate, incomplete, or inconsistent data will lead to unreliable insights. As a result, focusing on reliable, accurate, and consistent data is essential to any data strategy involving AI.
- **Data accessibility:** AI algorithms need access to a variety of relevant data points to identify patterns and deliver insights. That means your data strategy needs to bring together data from across the organization – as well as any third-party sources – to provide the most comprehensive data set possible for analysis. Ultimately, the more comprehensive your data, the more actionable the insights will be.
- **Data governance:** Data governance in the form of clear guidelines for data usage, access controls, and audit trails are essential for regulatory compliance. In turn, this compliance is a key ingredient of using AI successfully, as it's the only way to stay within regulatory guidelines and limit the risk of data breaches.
- **Data scalability:** Over time, your organization's data will inevitably grow in terms of volume, velocity, and variety. In fact, [the amount of data that companies generate is expected to increase 22% on average over the next 12 months](#). All of your data initiatives, including your AI, need to be able to match this scale. Your data strategy can help by outlining requirements for scaling data storage, processing, and analytics infrastructures, that way you can efficiently support the demands of your growing data program – including AI algorithms.
- **Data collaboration:** AI is about more than just the technology behind it. The most effective data programs bring together the power of AI with collaboration and decision-making from across the organization. Your data strategy can support this ideal by establishing a culture of data-driven decision-making that encourages everyone from business stakeholders spanning functions to data experts to share insights, best practices, and lessons learned from AI projects.

# 87%

**of analytics and IT leaders say that advances  
in AI make data management a higher priority**  
[- Salesforce State of Data and Analytics Report](#)

## Managing Your Data with Salesforce Data Cloud

A key part of any data strategy is defining the data architecture. This step is also essential for achieving true data unification, which is a top barrier for nearly half of analytics and IT leaders, who report having partial to no view into how data is used within their companies – making it challenging to monitor and manage data collection and use across disparate sources.

### **That's where a solution like Salesforce Data Cloud comes into play.**

Data Cloud unifies enterprise data and drives actions and workflows inside of your CRM. It allows your entire organization to not just visualize the complete picture of data, but also take action – whether that's answering customer questions, making planning decisions, or anything else – based on that data.

**In addition to integrating all data from across the organization into Salesforce, Data Cloud is also deeply embedded in Salesforce's Einstein AI platform, which allows it to enrich enterprise data with predictive insights.**



All of this means managing your data with Data Cloud can significantly impact go-to-market operations.

- For example, Data Cloud can help **increase sales efficiency** by surfacing buyer intent signals for more intelligent lead routing, identifying the best upsell and cross sell opportunities with personalized next best offer recommendations, and triggering notifications to help sellers reach out at just the right time.
- Meanwhile, it can **improve customer experiences** by using engagement data and purchase history to create personalized onboarding and support journeys, connecting complete customer history across channels to ensure service agents have the full picture to provide faster resolutions, and driving proactive communications to potentially at-risk customers following issues.
- And it doesn't stop there. On the marketing side, Data Cloud can **grow engagement through more relevant campaigns** by automating personalized journeys based on past behavior and preferences across channels, optimizing ad spend based on performance, and identifying new target audiences with a likelihood to purchase.

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## Less than half of sales, service, and marketing leaders are completely confident in their data accuracy

[- Salesforce State of Data and Analytics Report](#)

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Data Cloud delivers these levels of performance thanks in part to its focus on data quality, since making decisions based on data requires that data to be accurate and complete.

## Why Unify Your Data with Salesforce Data Cloud?

Salesforce Data Cloud offers a best-in-class data platform regardless of whether or not your organization uses other solutions in the Salesforce ecosystem.

In general, Salesforce Data Cloud offers several benefits that make it a best-in-class choice for organizations looking to unify and take action on data. These benefits include:

- Built-in, robust tools for maintaining data quality and governance
- AI-powered insights to uncover key trends in large data sets and quickly identify new opportunities
- Access to a vast marketplace of third-party data sources for data enrichment
- Broad ecosystem of partners to further extend functionality for specific requirements

### For companies already using Salesforce

If your organization already uses other solutions in the Salesforce ecosystem, the direct connection with Data Cloud makes for a truly seamless experience.

This connection extends to everything from having a unified view of customer data in one, comprehensive profile that shows activities across channels, preferences, and more to supporting streamlined data management across the Salesforce ecosystem.

Think of Data Cloud as an extension of your other Salesforce solutions, providing a centralized place to view and act on data – making for more efficient and effective processes around driving sales, improving customer support, and achieving any other business objectives.

### For companies not using other Salesforce solutions

Even if your organization doesn't use any other Salesforce solutions, Data Cloud still offers numerous benefits.

To start, Data Cloud offers deep audience insights based on demographic, firmographic, and behavioral data from diverse sources. This makes it possible to better understand your audience and any trends in their behavior and to identify potential new opportunities.

Data Cloud also supports lead gen activities that can help go-to-market teams identify potential customers and prioritize outreach, even if you don't use Salesforce as your CRM. Combined with Data Cloud's data enrichment capabilities, your team will have a deep understanding of which prospects to talk to and when for maximum impact.

Finally, the compliance, governance, and privacy management features that Data Cloud offers are essential to reducing risk and complying with various regulations. And the built-in collaboration and knowledge-sharing capabilities make it possible for users from sales, marketing, support, and more to access your customer data securely and align on shared strategies accordingly.

# How Different Teams Can Put Salesforce Data Cloud to Work

At a time when [65% of customers say they expect companies to adapt experiences to match their changing needs](#), it's concerning that [80% of business leaders say personalization is difficult to scale](#). The key to scaling personalization? It all starts with mature data management capabilities.

Knowing that, what do the benefits of more mature data management look like in action? Consider the following real life use cases for how various teams and industries can put Salesforce Data Cloud to work to improve maturity.

## How can your team use Data Cloud?

### Marketing

Marketing is always looking for more, better leads, and Salesforce Data Cloud can make that happen. Specifically, Data Cloud makes it easy to enrich lead profiles with additional insights, such as demographic data from third-party sources or behavioral data from across channels. This leads to more robust profiles that can help marketing teams prioritize their efforts and better personalize outreach strategies to get those coveted conversions.

### Sales

What's better than closing a deal? Closing an even bigger deal with the same customer. And it's exactly that cross sell/upsell motion that Data Cloud can help solidify for sales teams. By providing rich customer profiles with detailed information around previous behavior and both past and predicted interests, Data Cloud can empower sales teams to have more informed conversations and recommend additional products/services that each customer is most likely to need. That personal touch can not only help improve the overall sales experience, but also lead to bigger deals.

### Service

Far too often, service teams are bogged down by manual tasks, whether that's tracking down customer data from different systems or inputting data from conversations with customers into those various systems. Fortunately, Data Cloud offers a less manual solution in the form of one, comprehensive customer profile. That's right: One place where service agents can go to find a customer's entire history – purchases, past conversations, previous issues, you name it. The result? Better insight into each customer's past and current needs that leads to more efficient issue resolution. That's what we call a win for your customers and your agents alike.

## How can your industry use Data Cloud?

### Retail

What retailer doesn't want to deliver a superior shopping experience across channels? Make it happen with better, more personalized product recommendations that feel cohesive as shoppers move from one channel to the next. First, Data Cloud can deliver personalized product recommendations based on each customer's past behaviors and predicted interests. Next, it can make sure that those recommendations stay consistent across your ecommerce site, ads, email outreach, and more. It's like giving each customer their own personal shopper

### Consumer Goods

For any consumer goods company looking to increase market share and revenue through deeper insights into customer behavior and purchase patterns, Data Cloud is a must. To start, Data Cloud can help optimize retail partnerships by analyzing consumer data to identify trends and preferences in different markets and regions. Teams can use this insight to optimize product assortment and pricing strategies to better meet consumer demand and drive sales growth. On top of that, Data Cloud can also help with supply chain visibility and forecasting by using those same consumer purchase patterns to improve inventory management, production planning, and distribution strategies to minimize stockouts and excess inventory.

### Manufacturing

Manufacturing companies have a lot to keep their eyes on, from production and facility operations to order fulfillment and customer service. Data Cloud can help by providing a single source of truth for more streamlined operations. The ability to combine data points from teams across the business delivers a more seamless flow of information throughout the entire manufacturing lifecycle. In turn, this can improve efficiency and reduce costs.





# What's Required to Successfully Deploy Data Cloud

Salesforce Data Cloud is a powerful solution for unifying data and turning that data into a strategic asset for your organization. But getting to that point requires more than just a well-defined data strategy; it also requires a proper setup of Data Cloud.

## A successful Data Cloud deployment covers several key steps:



### Assessment and Planning

- Define your objectives
- Identify what data will live in Data Cloud (as aligned to your objectives)
- Evaluate the quality, relevance, and readiness of data sources
- Determine initial use cases for Data Cloud



### Data Preparation

- Cleanse and standardize all data (including deduplication and enrichment as needed) for accuracy and consistency
- Verify compliance with data governance requirements based on your data strategy and external regulations



### Integration

- Integrate Data Cloud with the relevant data sources
- Configure data syncs to keep data flowing as planned



### Configuration and Customization

- Configure data models
- Create custom fields as needed
- Define relationships between data objects
- Introduce data enrichment (e.g. adding attributes or third-party data)



### User Training

- Introduce the purpose and goals of Data Cloud to users
- Deliver hands-on training
- Provide resources to answer questions long-term
- Develop ongoing processes based on Data Cloud usage



### Regular Monitoring

- Monitor progress toward objectives
- Track data quality, system usage, and user feedback to identify areas for improvement
- Look for opportunities to optimize or expand over time based on changing needs
- Stay up to date on new features from Salesforce

## Getting Started with Salesforce Data Cloud with AllCloud

No matter where you are on your journey, AllCloud can help you craft a data strategy.

Our expertise in modern analytics solutions, advanced analytics capabilities, data migration, applications, and analytics and AI ensure you're on the right path to success.

And we bring more than just data strategy expertise to the table.

AllCloud is also a leading Salesforce Consulting partner, with over 15 years of experience working on Salesforce projects. Importantly, we

don't just provide solutions — we craft custom strategies to help you build a smarter business. With cutting-edge thinking, AllCloud's experts use their deep experience to architect, design, and implement a Salesforce solution that will help you fulfill your immediate requirements and fit into a larger, future-proof roadmap.

Although Salesforce Data Cloud has only been around for a few years, the AllCloud team already has extensive experience working with the newest Salesforce solution, including six Certified Data Cloud Consultants on staff and several Data Cloud projects under our belt.



### Ready to get started? AllCloud's No-Cost Data Cloud Assessment can help.

This free, 1-2 day workshop helps your team identify, understand, and prioritize what's most important through **Executive Visioning & Alignment, Comprehensive Review & Evaluation, Use Case Identification & Development, and Solution Recommendations & Deliverables.**



*This assessment can help your team understand readiness for Salesforce Data Cloud so that you can start reaping benefits like more unified data, AI-powered recommendations for personalized offers, and better data activation across channels. Ultimately, you'll walk away with a practical roadmap and clear feedback to get started.*