



IMPACT: New York

IMPACT City Tour

20th June 2024

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Elements.cloud
THE CHANGE INTELLIGENCE PLATFORM



uptima. 



IMPACT Welcome

+ Housekeeping



Nicole Kidd

ISV Senior Partner Account Manager

salesforce



Thank you



Thank You



Change Intelligence Research Series

Data-driven insights to help change behaviour



Ian Gotts

Founder & CEO



You guys start coding, and
I'll find out what they want



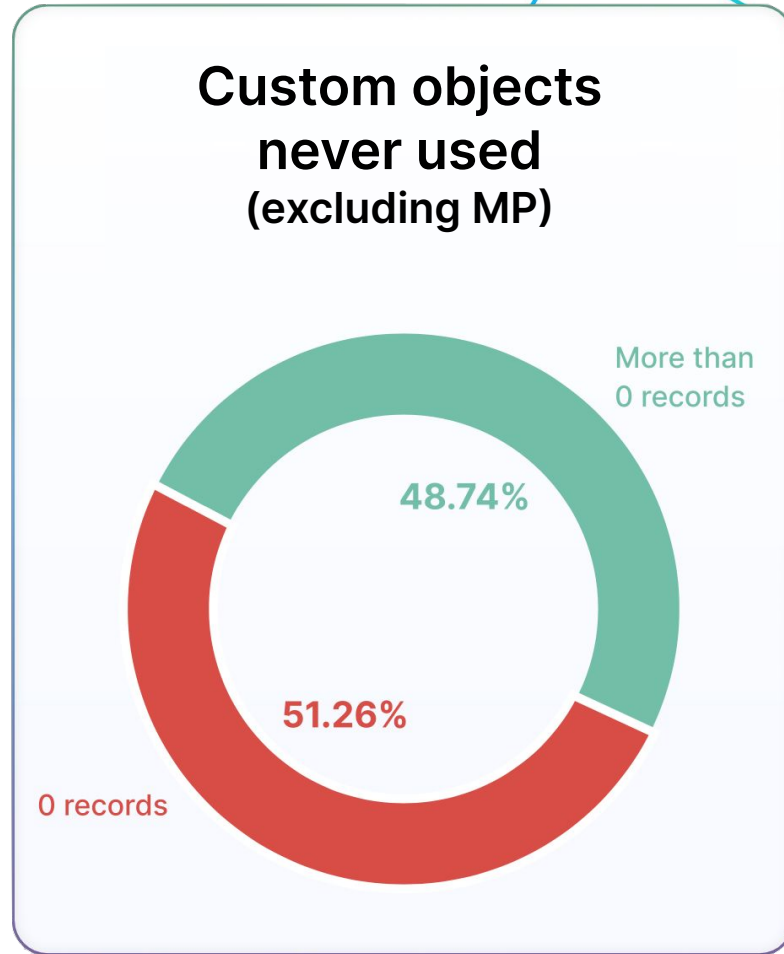
Change Intelligence Research Series

Data-driven insights
into the trends in
Salesforce configuration



Wasted effort

Feedback
Meetings
Slack messages
Development
Testing deployment
Documentation



Wasted effort

Feedback

Meetings

Slack messages

Development

Testing deployment

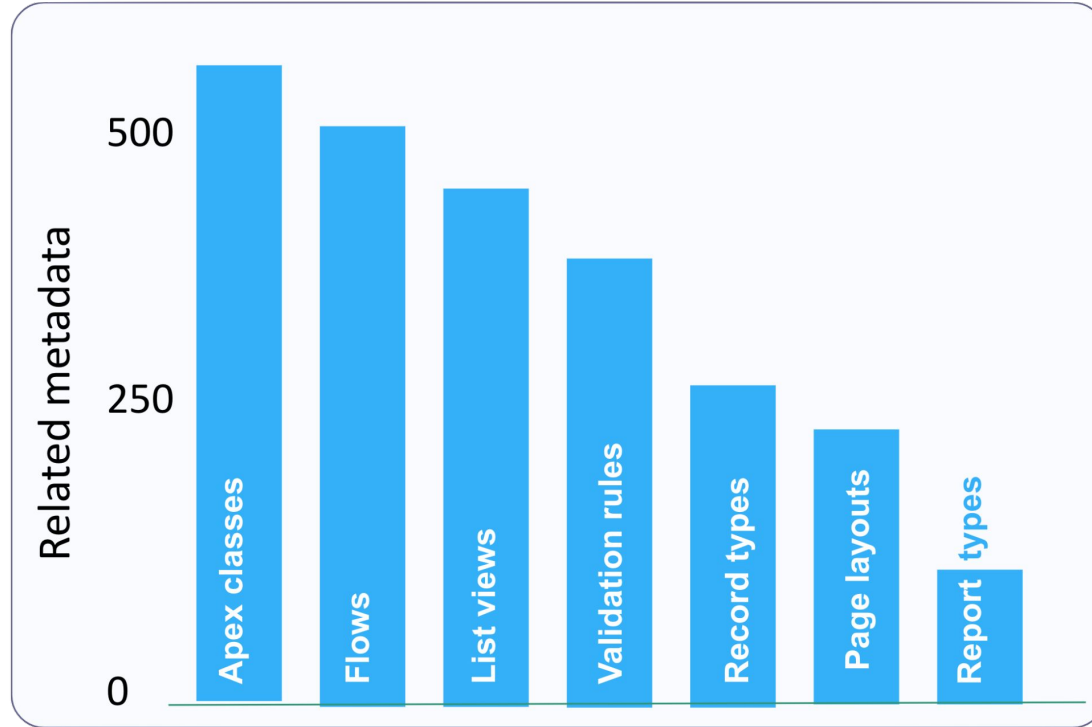
Documentation



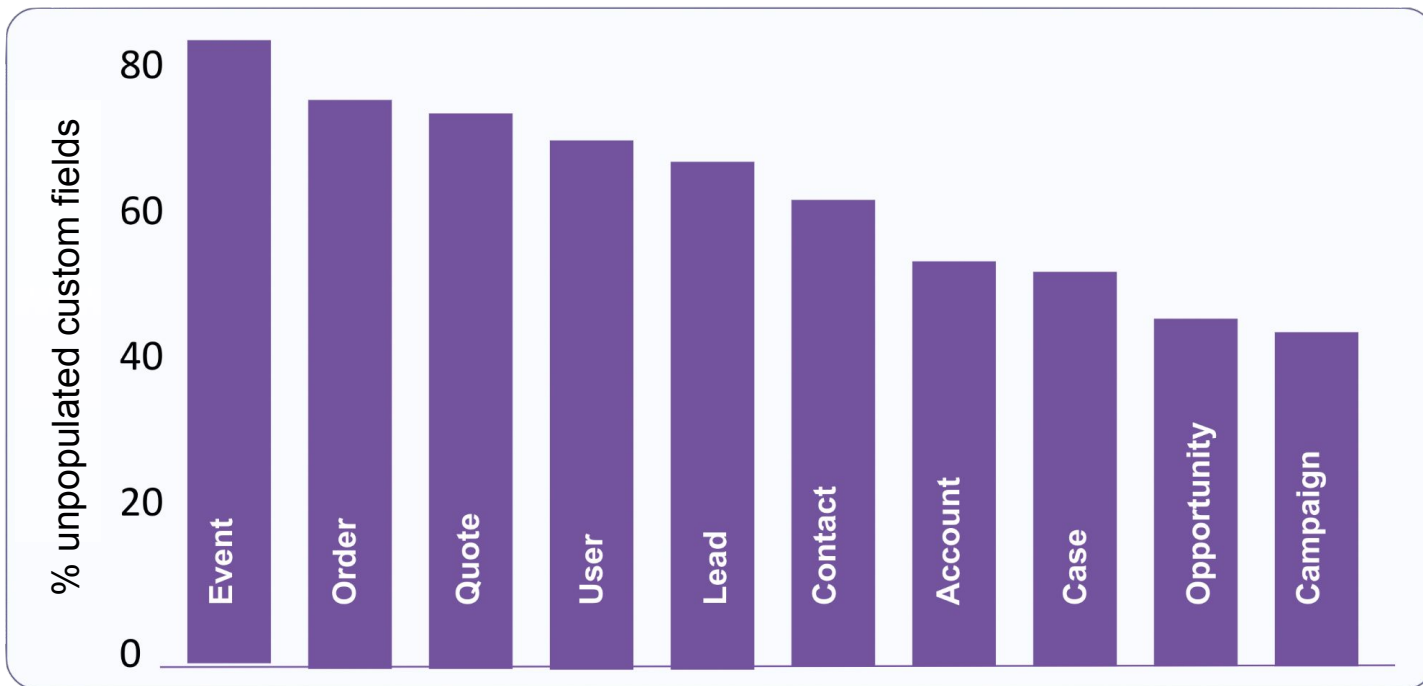
Custom fields with 0% data (excluding MP)



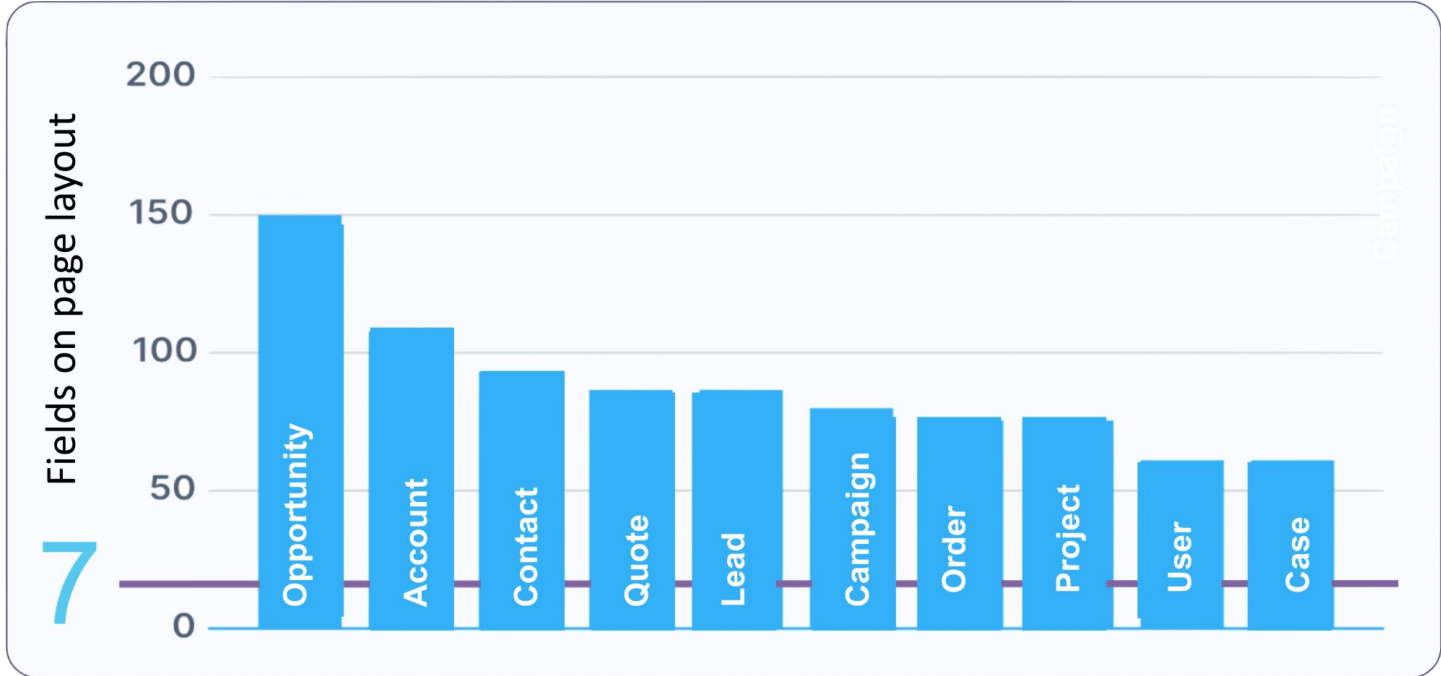
Related development effort



Far worse than 41% average



Confused users and poor data



Salesforce @scale dilemma



FORRESTER®

The complexity of scale crushes Salesforce's responsiveness.

As Salesforce use grows, innovation slows and flexibility evaporates.

Why? Every app change risks breaking one of hundreds of data and process customizations, integration links, and third-party add-ons.

The result: every change requires long and expensive impact-analysis and regression testing projects – killing the responsiveness that made Salesforce attractive at the start.

Salesforce @scale dilemma



FORRESTER®

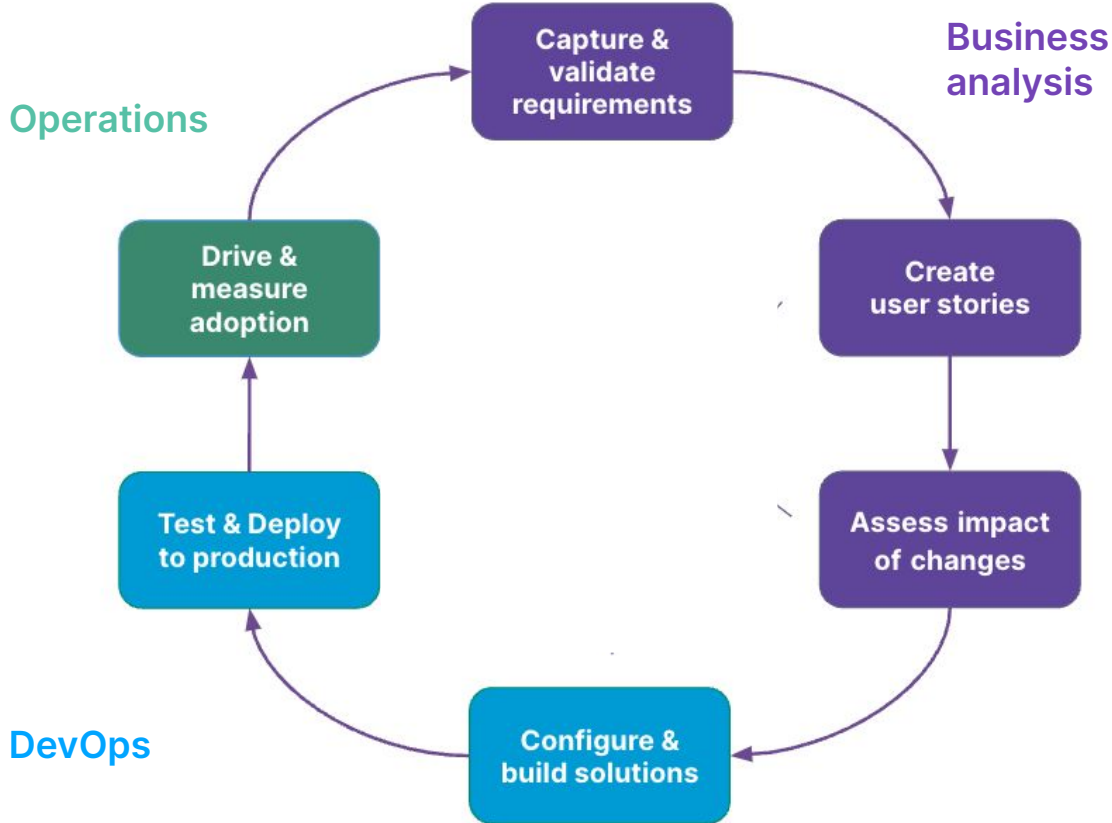
*The complexity of scale **crushes Salesforce's responsiveness.***

*As Salesforce use grows, **innovation slows** and flexibility evaporates.*

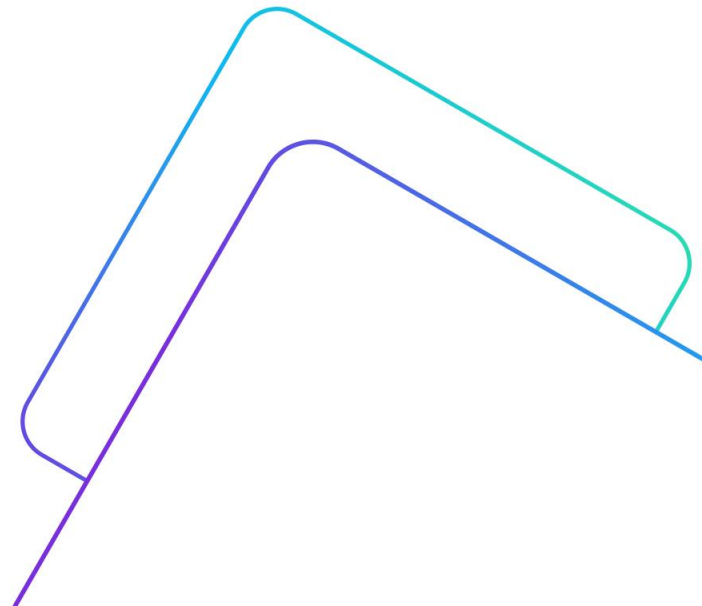
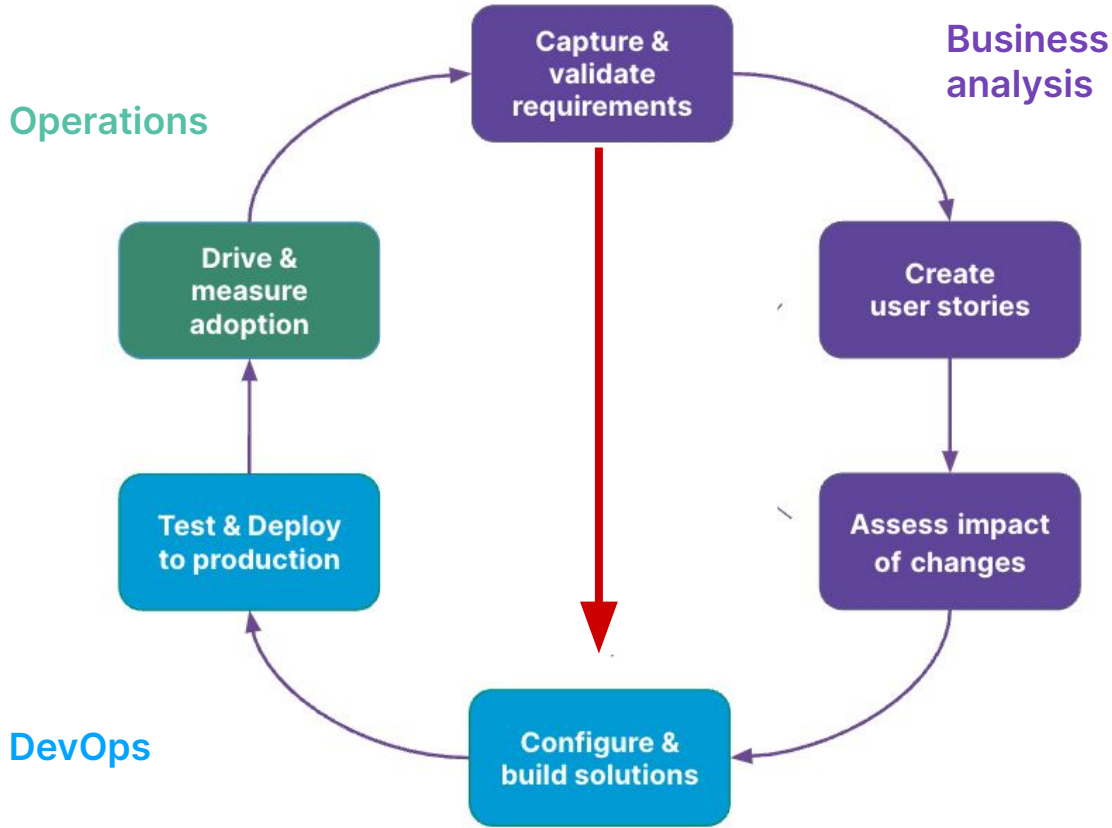
Why? Every app change risks breaking one of hundreds of data and process customizations, integration links, and third-party add-ons.

*The result: every change requires long and expensive impact-analysis and regression testing projects – **killing the responsiveness** that made Salesforce attractive at the start.*

Implementation lifecycle



Shortcuts take longer

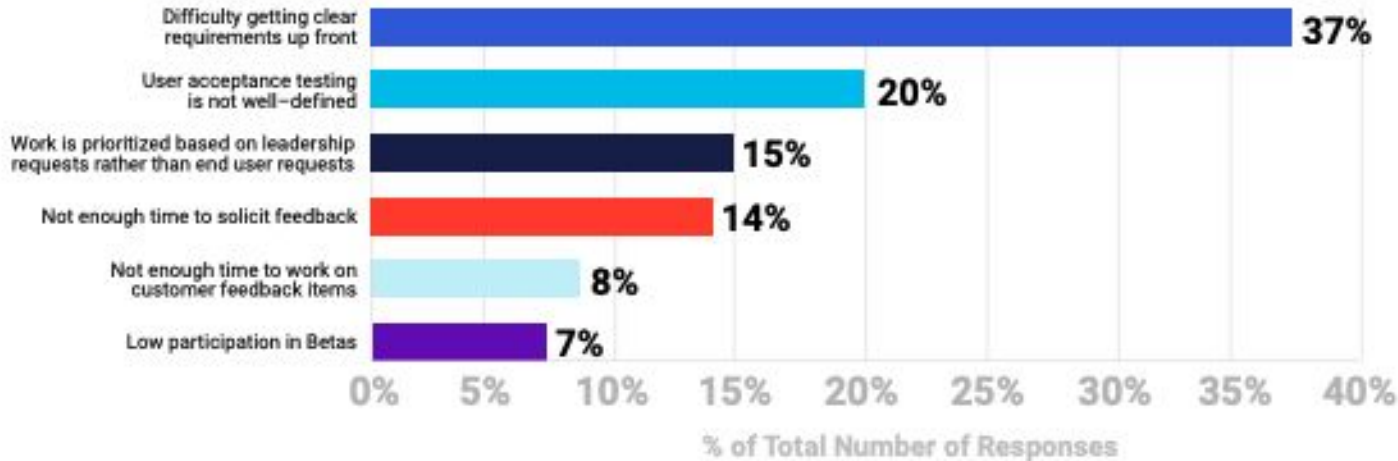


Copado State of DevOps Report



Difficulty getting clear requirements up front

Most challenging part of integrating customer feedback?



Change Intelligence Research Series



Change Intelligence



Richard Parker

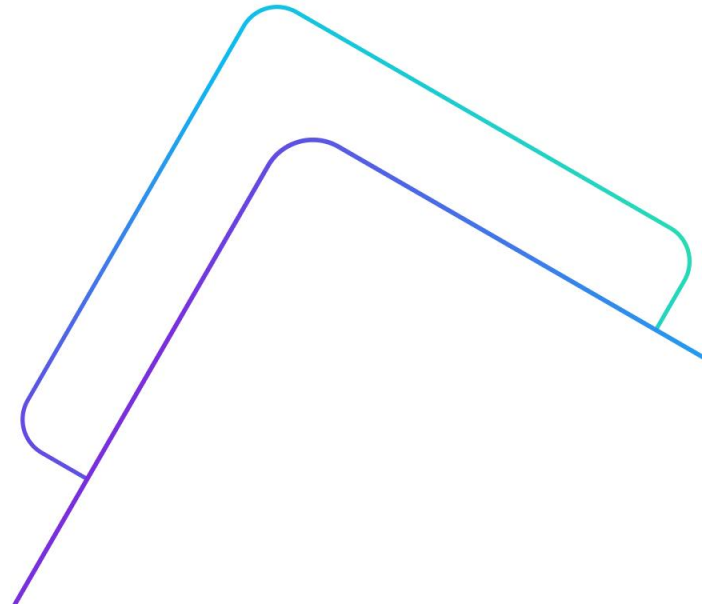
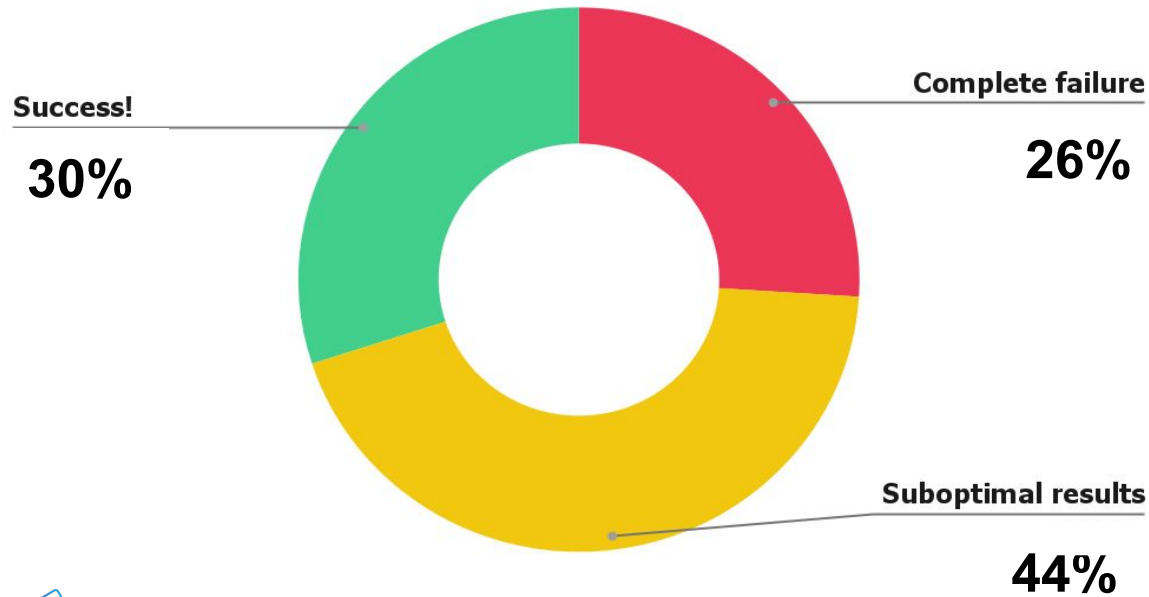
Founder and Chief Customer Officer



\$1 TRILLION WASTED

% of projects that end in failure

Based on BCG's "Flipping the Odds of Digital Transformation Success" 2020 report



Noisy Waste

87.5%

Fail to meet objectives

3 Stages of a Successful Digital Transformation

Harvard Business Review, September 20, 2022

Didier Bonnet

26%

Deemed 'total' failures

Flipping the Odds of Digital Transformation Success

Boston Consulting Group, October 29, 2020

Patrick Forth, Tom Reichert, Romain de Laubier, and Saibal Chakraborty

69%

Wasted spend

Digital Transformation Is Not About Technology

Harvard Business Review, March 19, 2019

Behnam Tabrizi, Ed Lam, Kirk Girard, and Vernon Irvin

Not a technology problem...

THE 8 WASTES.. IN DIGITAL SOLUTIONS

www.linkedin.com/in/vincentdupuis



DEFECT

Rework due to malfunctioning or over-complex solution to complete desired operation right first time



WAITING

Low performance, outage or poor response time inducing waiting time by the user



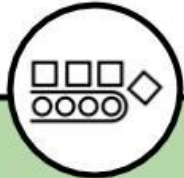
INVENTORY

On-going process waiting to be actioned ("stuck" workflow, untreated inbox items...)



USELESS MOTION

Complex ergonomics, excessive number of clicks or screens/apps to provide data and complete desired operation



OVERPRODUCTION

Features that nobody uses, report nobody reads, email sent to everyone...



TRANSPORT

Excessive or unnecessary number of process steps to get the desired operation completed



EXCESS PROCESSING

Useless steps, Redundant or obsolete operations adding no value add to the desired outcome



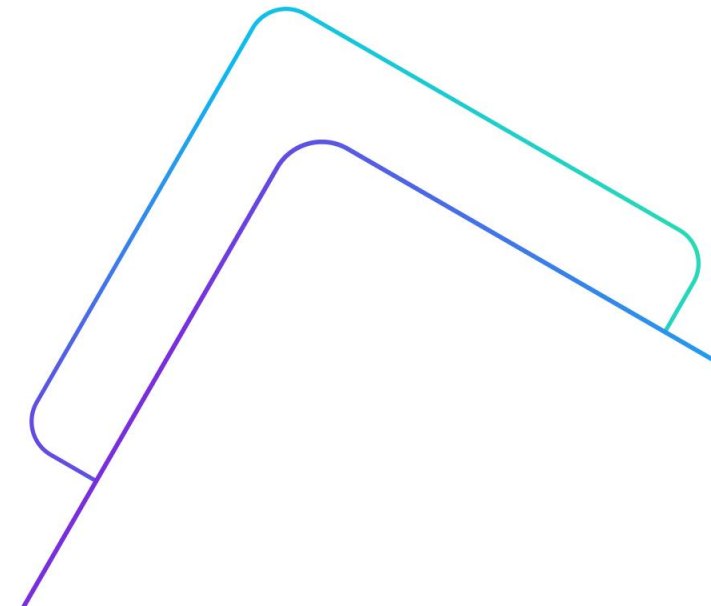
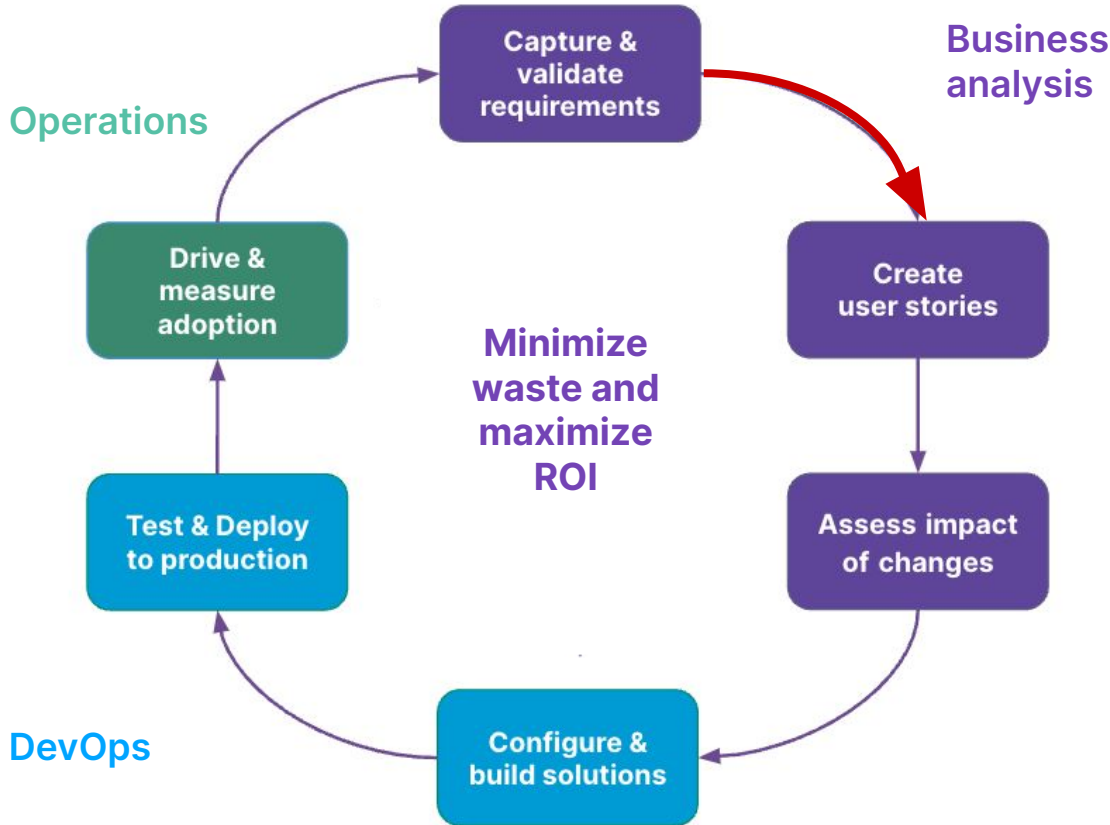
MISUSED TALENT

Poor use of people's time learning solutions or repeated basic tasks that could be automated or skipped

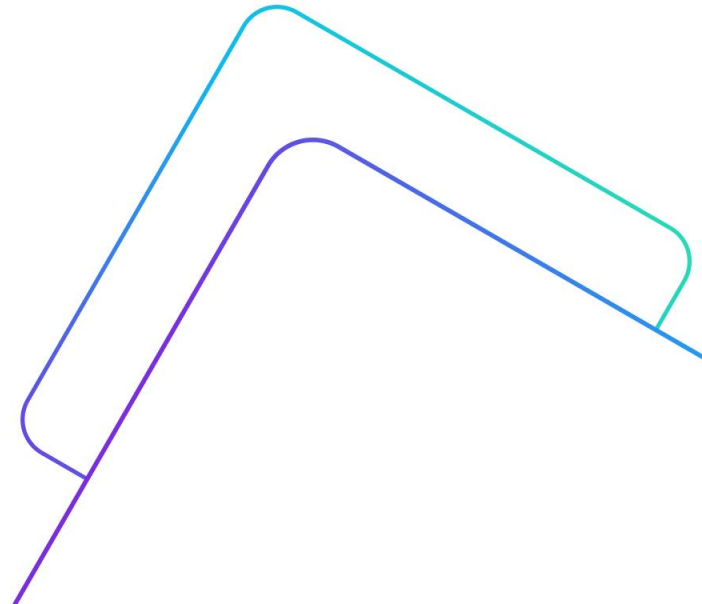
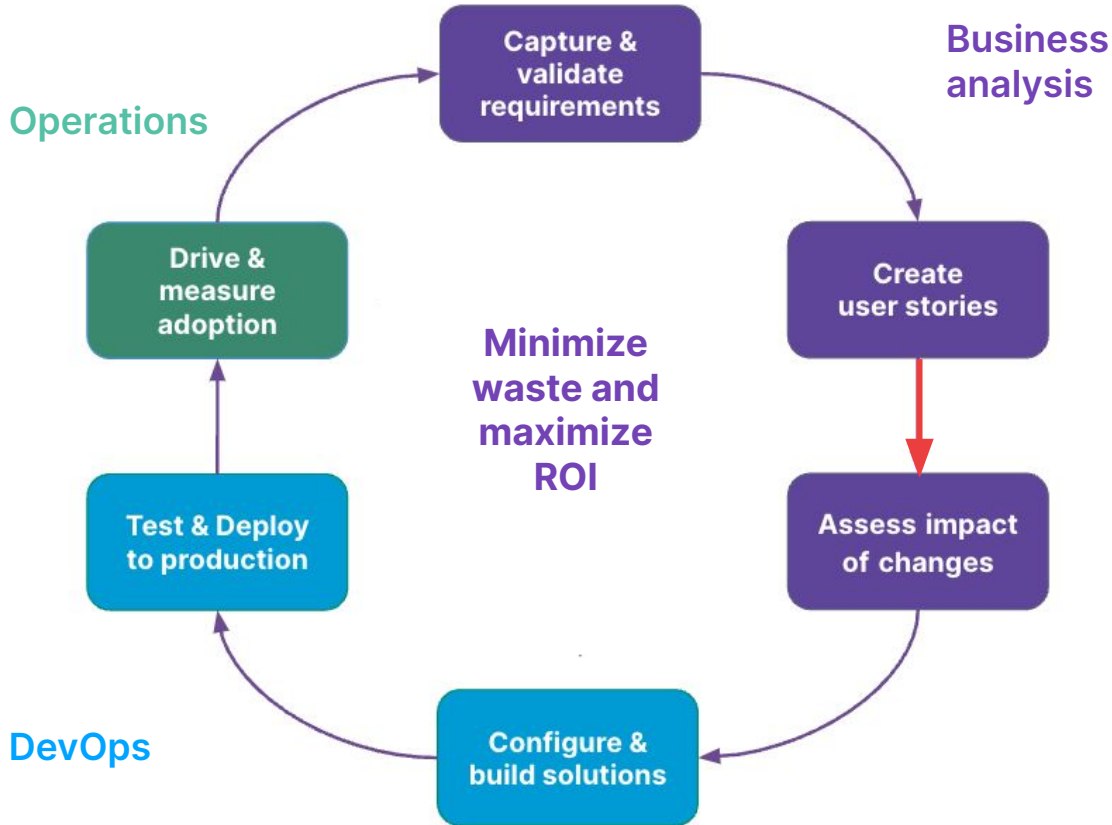
v1.0

credit : Airbus : www.linkedin.com/in/vincentdupuis

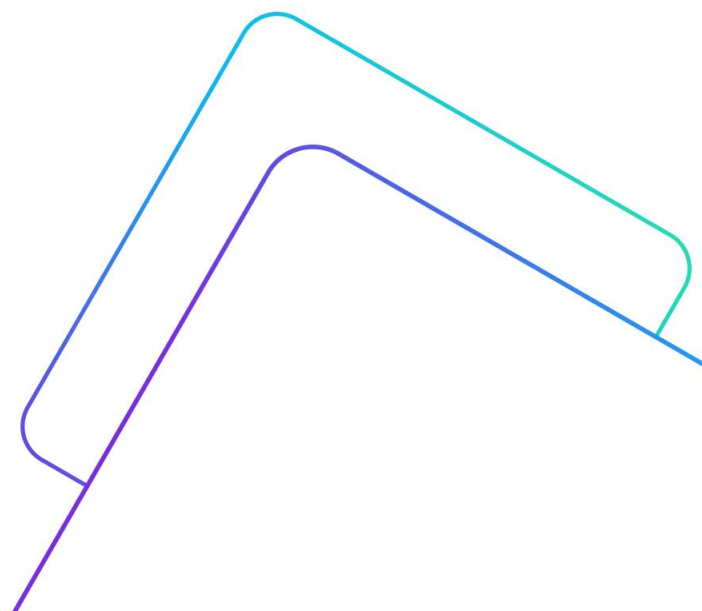
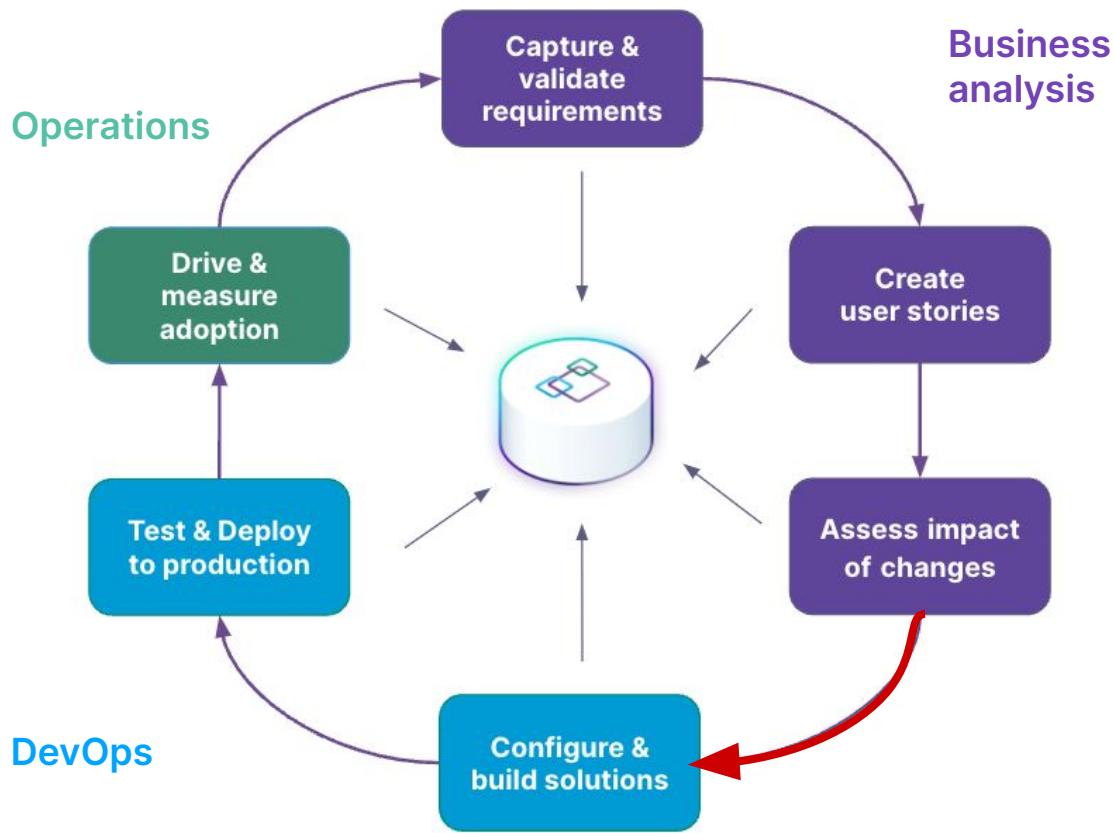
Handover : **validated** requirements



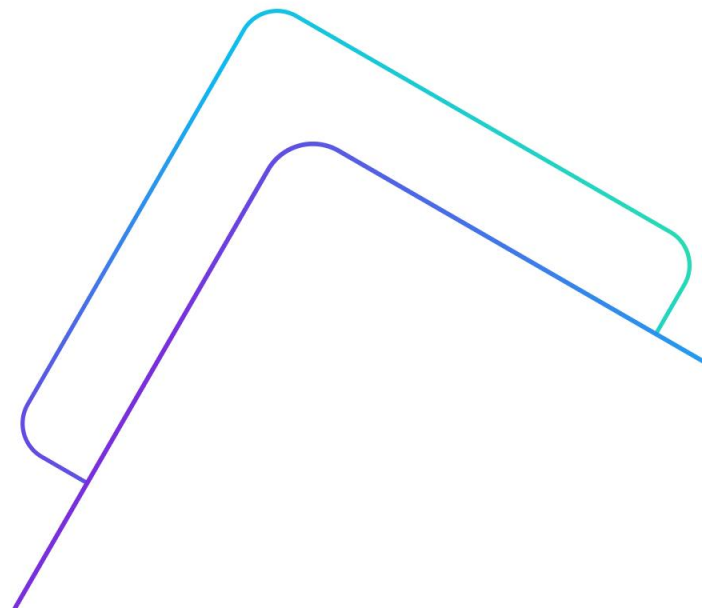
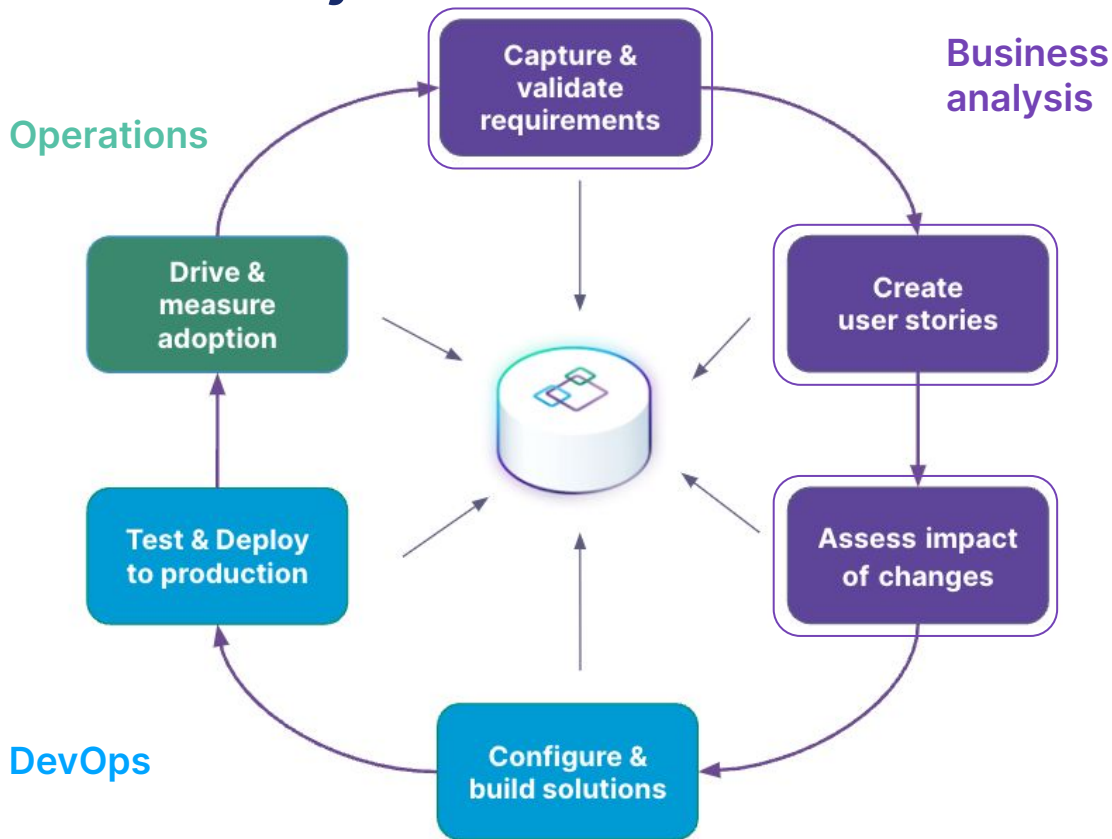
Handover: **complete** user story



Handover: change impacts understood



Change Intelligence Platform (accelerated by GPT)

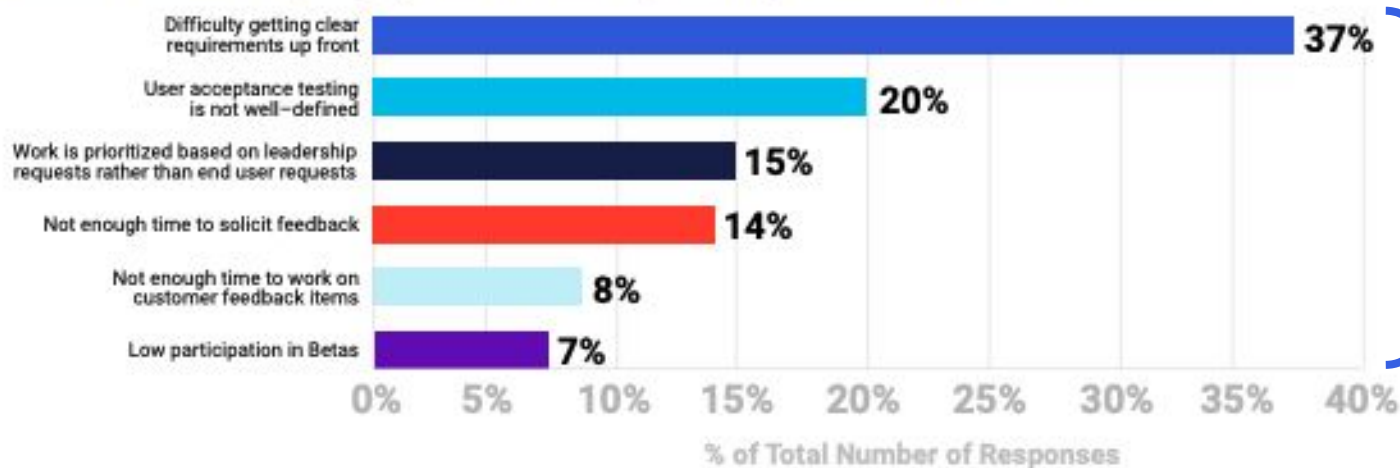


Copado State of DevOps Report



Change intelligence impacts all of these

Most challenging part of integrating customer feedback?





Einstein 1

Now AI works for business & everyone can be an Einstein

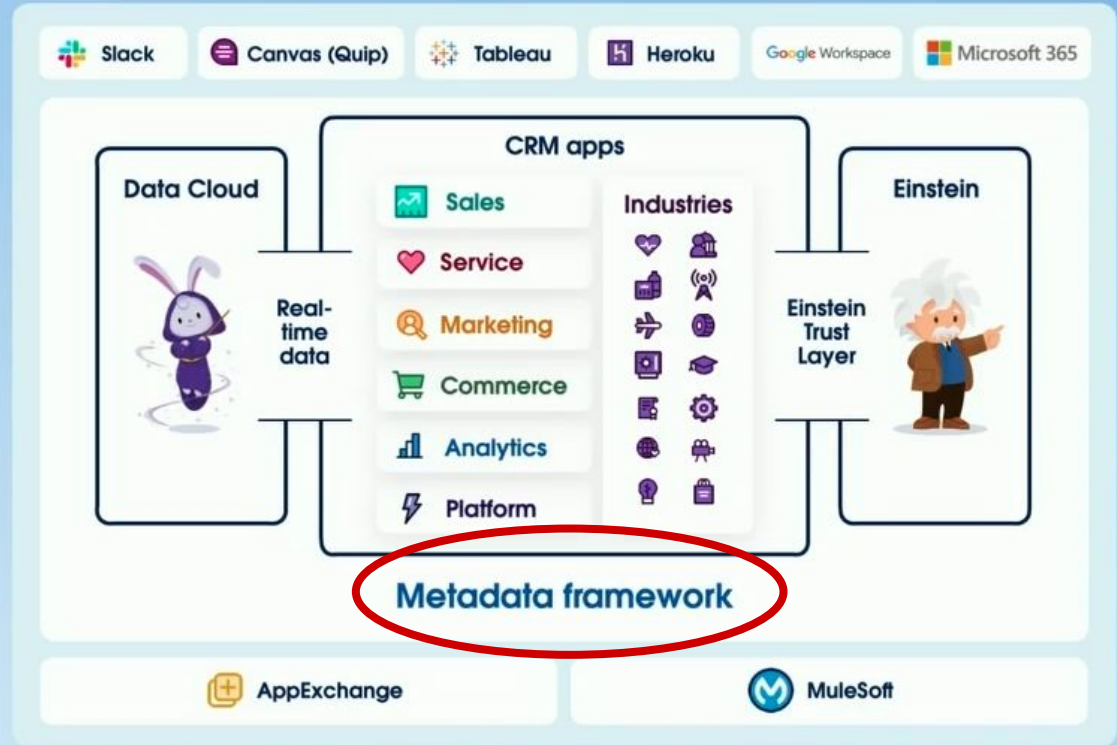
Integrated

Intelligent

Automated

Low code & pro code

Open



“

We saw more than 1,000 new Data Cloud purchases in the quarter. That's the second quarter in a row where we saw Data Cloud with more than...

Marc Benioff
Chair and CEO, Salesforce

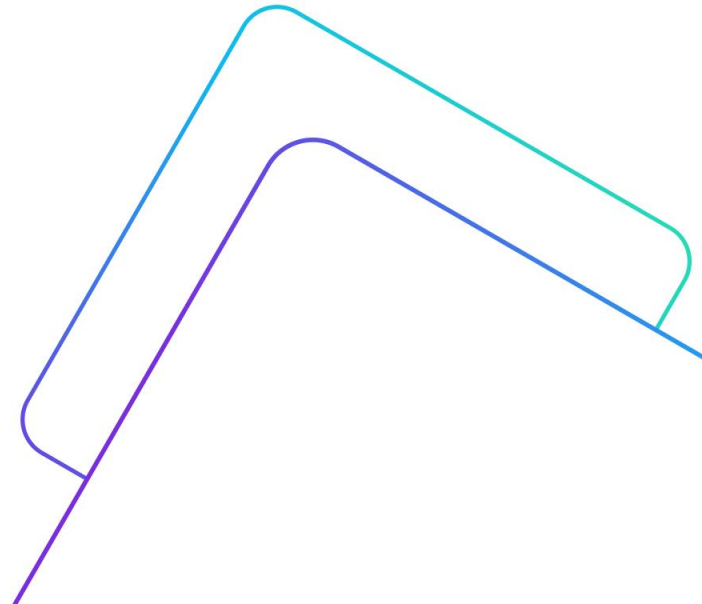


salesforce

Strategic vs Tactical

Accelerate time to value

- Salesforce agility and ROI lost
- Rework required to get user adoption
- Wasted effort building the wrong thing



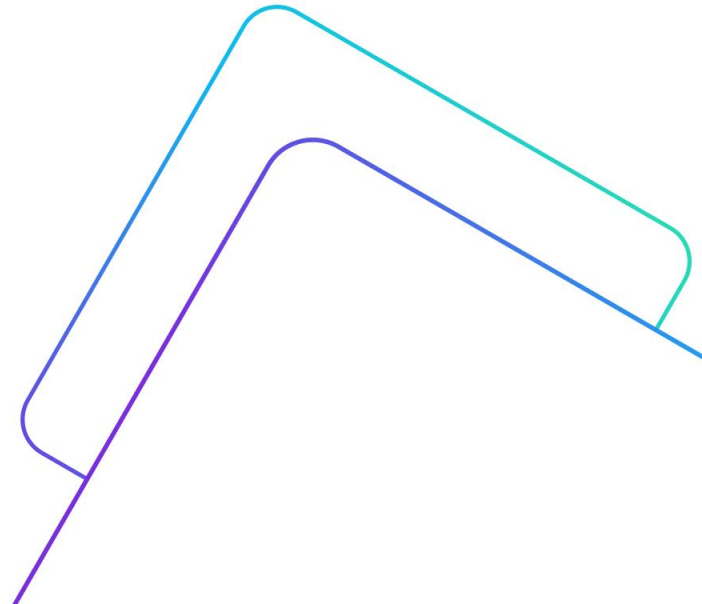
Strategic vs Tactical

Understand true requirements

- Lack of business and IT alignment
- Incomplete Business Analysis
- Incoherent user stories

Improve Salesforce agility

- Org complexity
- Technical debt
- Inadequate documentation



Data Cloud



Brooke Mohnkern

Senior Customer Success Manager



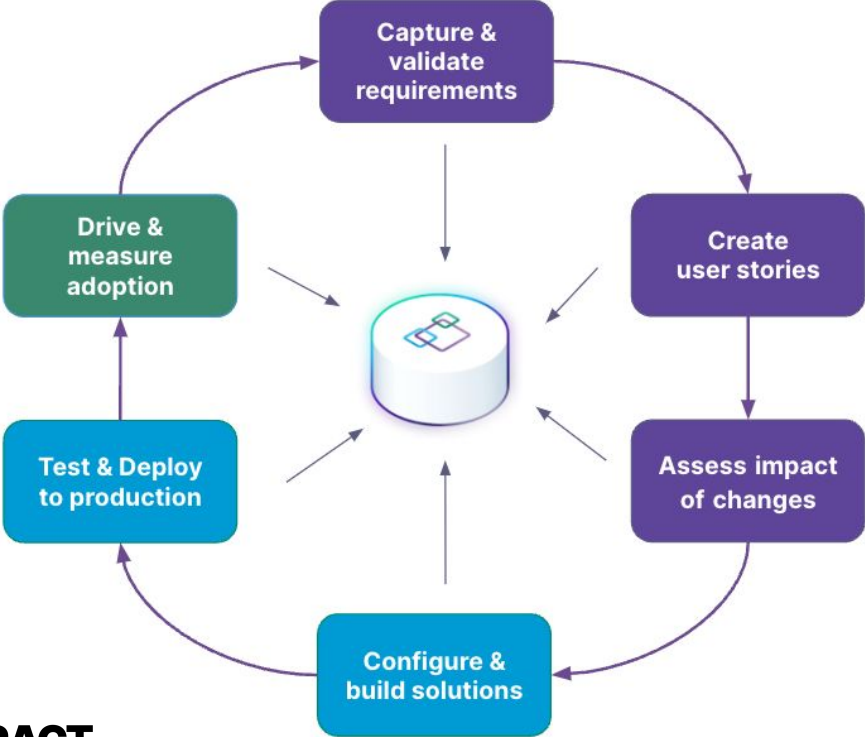
What is Data Cloud?

It is an ACTIONABLE data lake.

Allows the data lake to be integrated into Salesforce



Implementation is the standard lifecycle

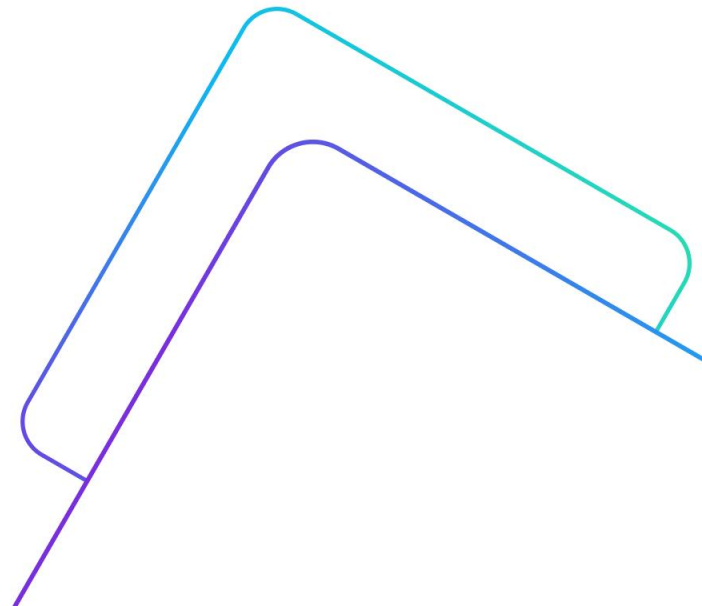


80% - 20%

Focus on the use case

It is too easy to get wrapped up in the technology.

It is all about what you can do with actionable unified data.



Our internal use cases

1. Engage contacts who have been on a product webinar and have:
 - a. Used that feature in Elements in the next 15 days.
 - b. Not used that feature in the next 15 days.
2. Calculate an engagement score for a contact (product usage, marketing engagement, training participation etc.) and make it visible in Salesforce
3. **Display detailed product usage data directly in the Salesforce UI**
4. Recommend personalised training plan or feature to individuals

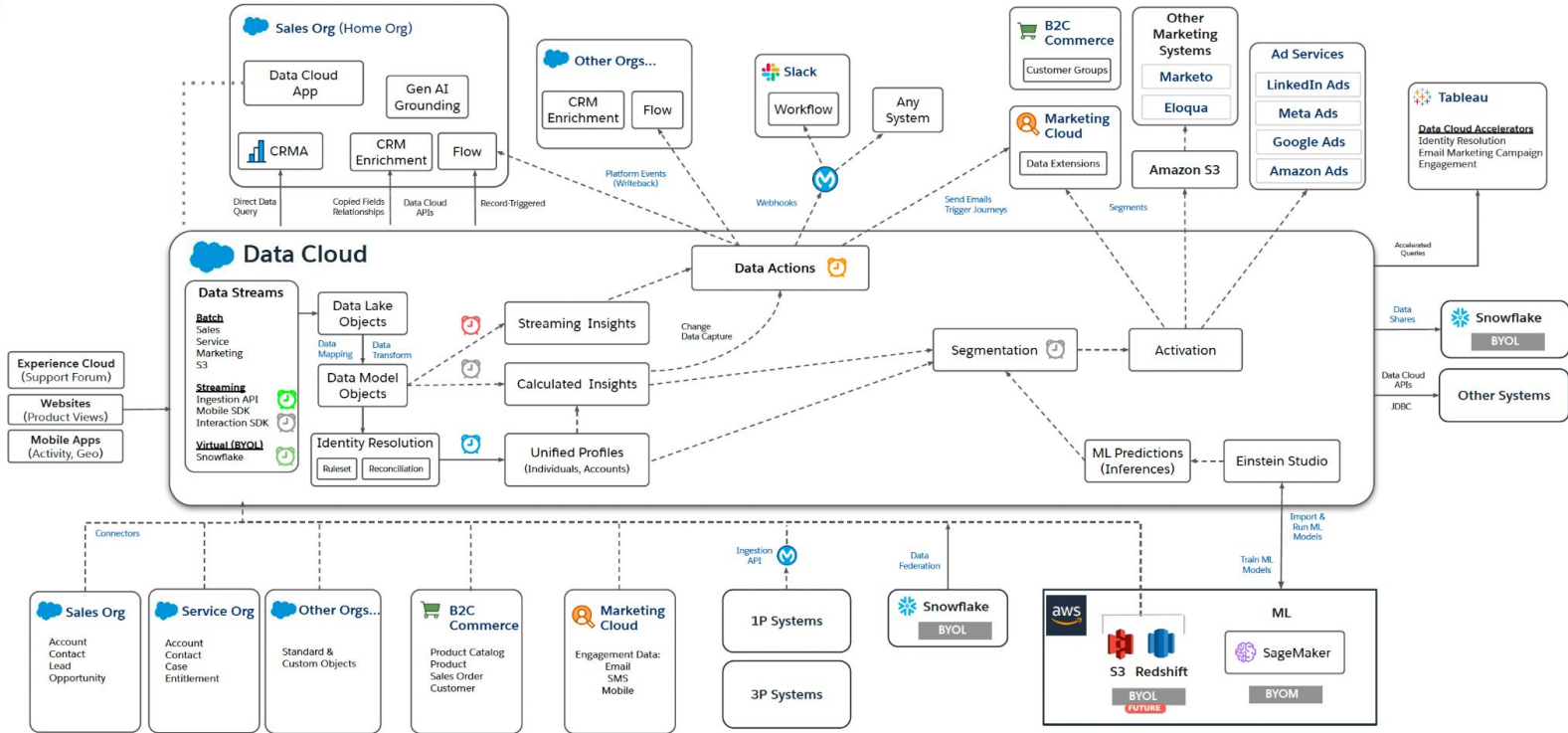
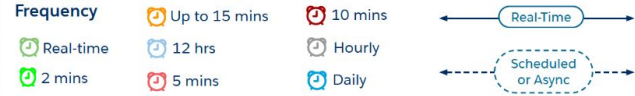


IMPACT

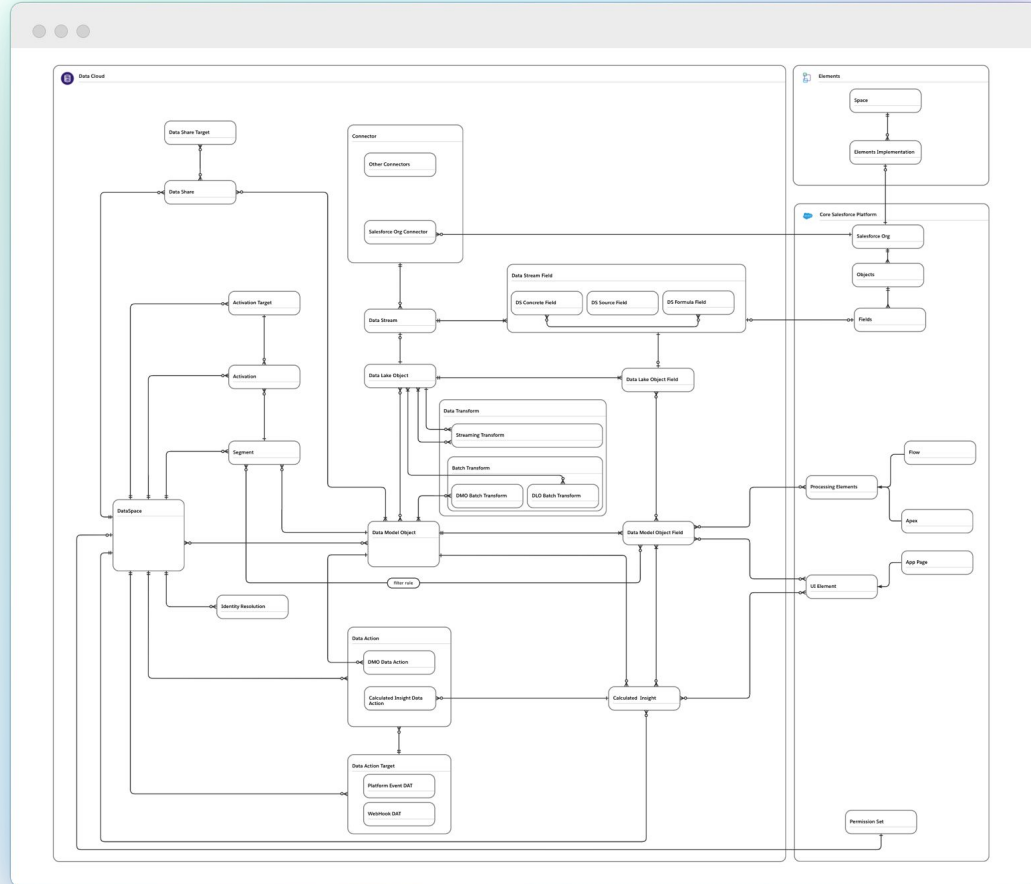
Document your enterprise architecture

Data Cloud

Vision for an enterprise architecture using Data Cloud



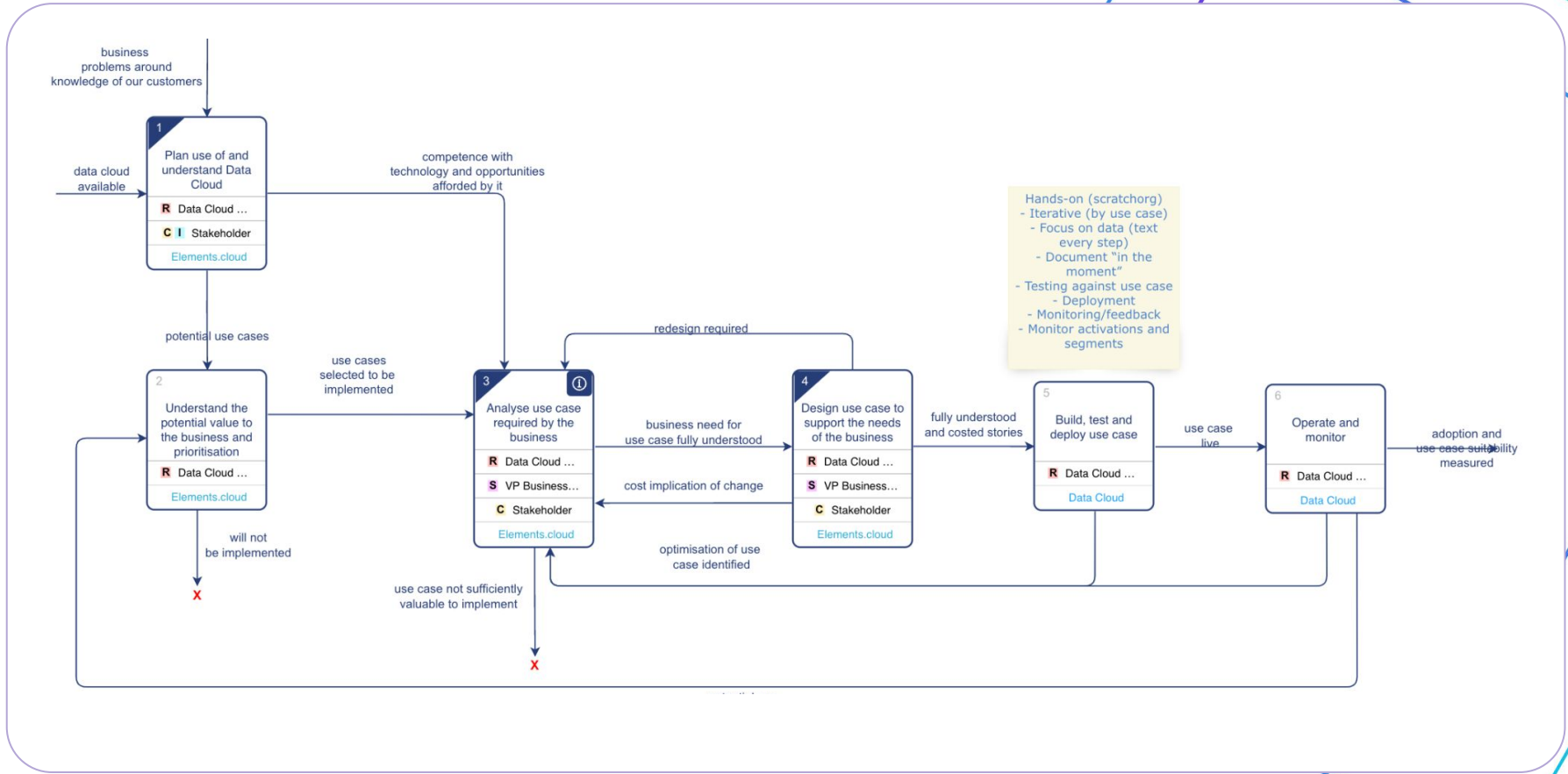
The Data Cloud ERD



Our solution design



Implementation methodology



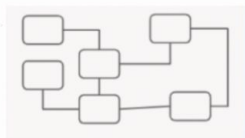
Planning documentation

ANALYSIS

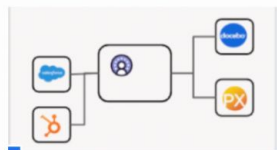
Requirements



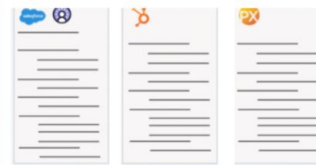
Use Case ERD



Context DFD



Metadata dictionaries

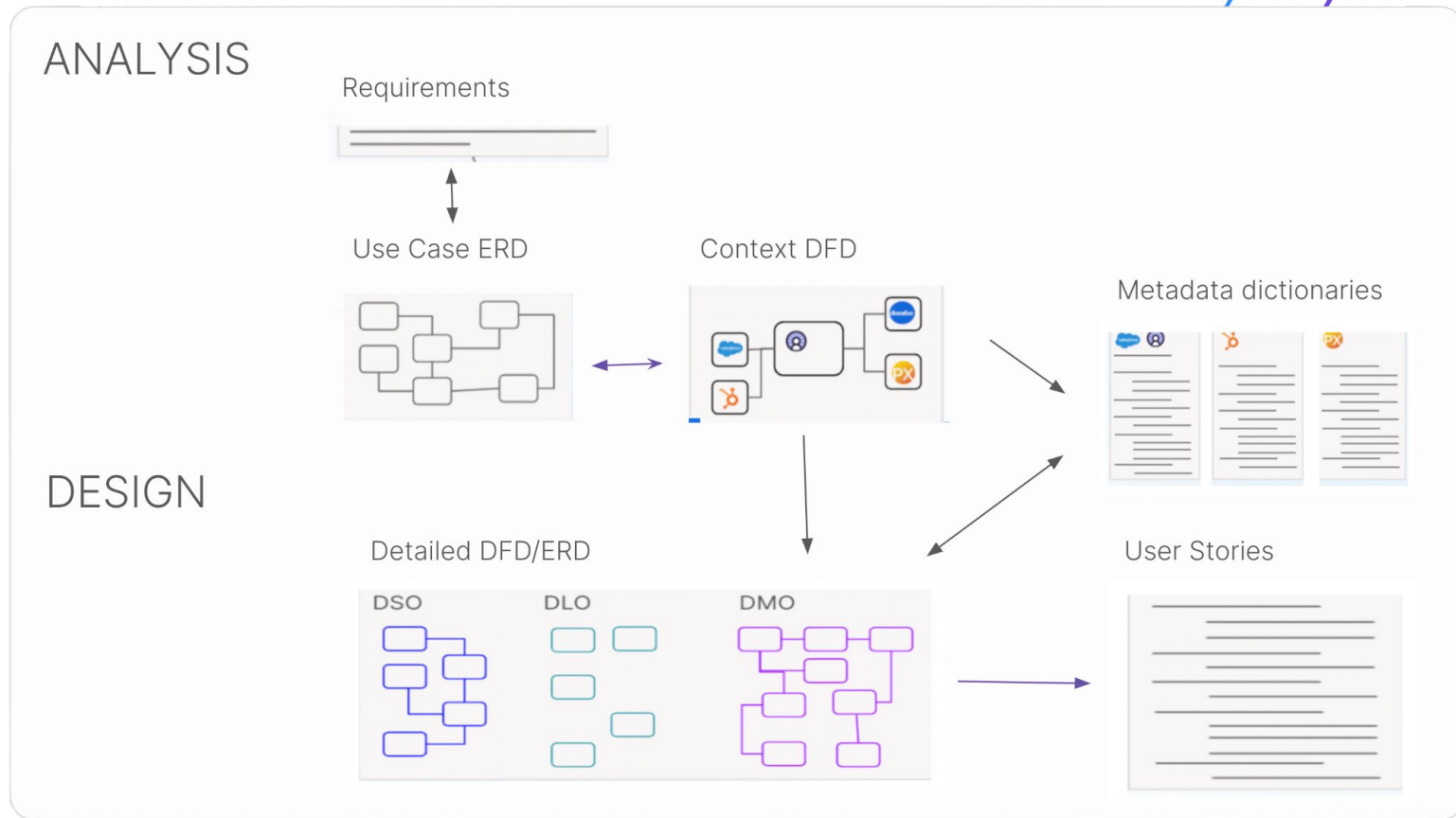


DESIGN

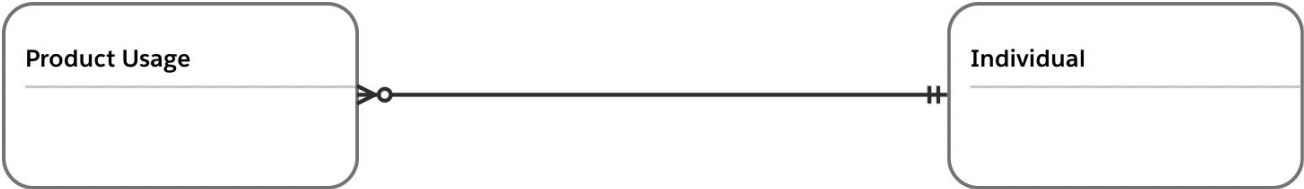
Detailed DFD/ERD



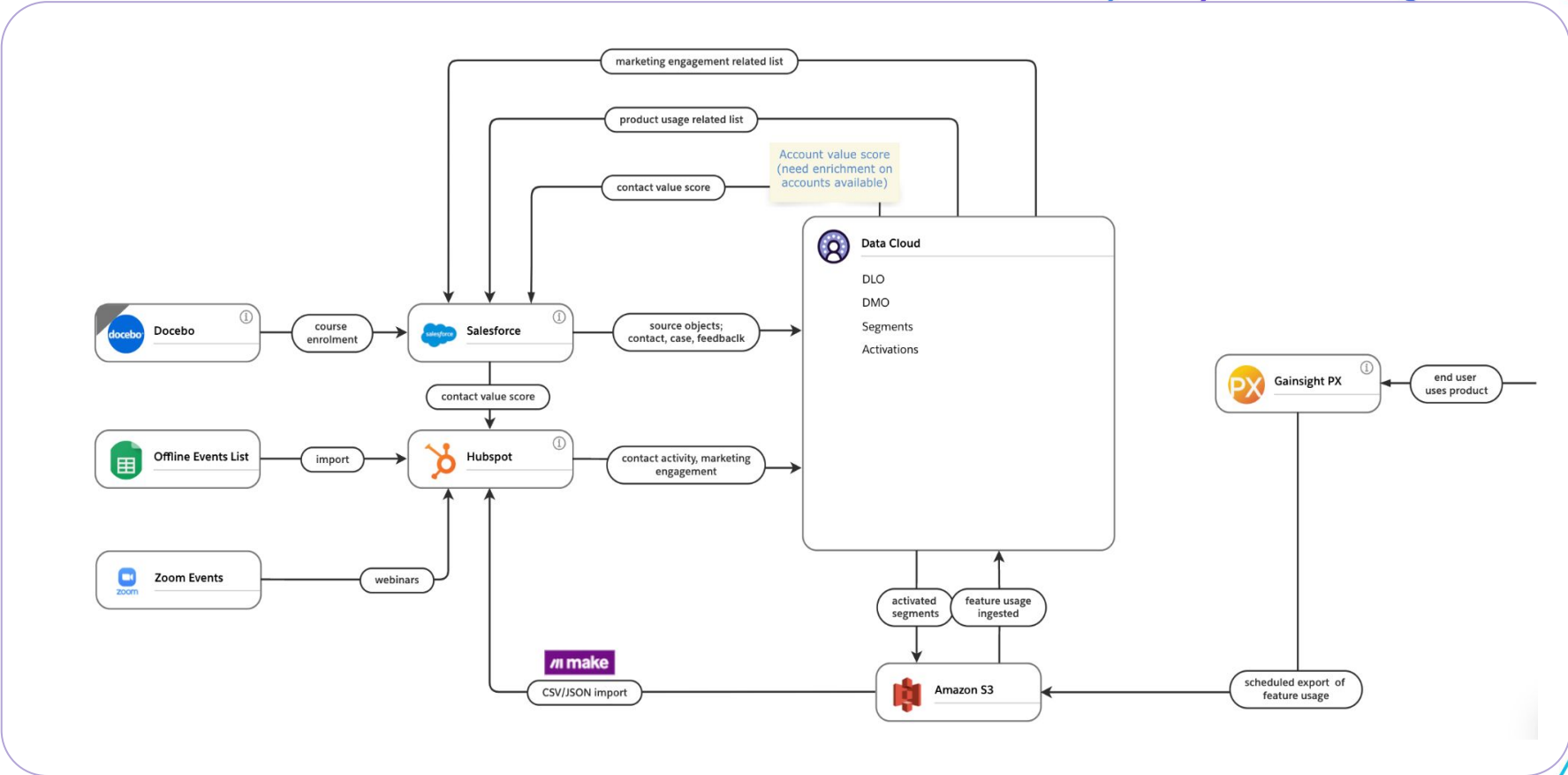
User Stories



Contact value - Use Case ERD



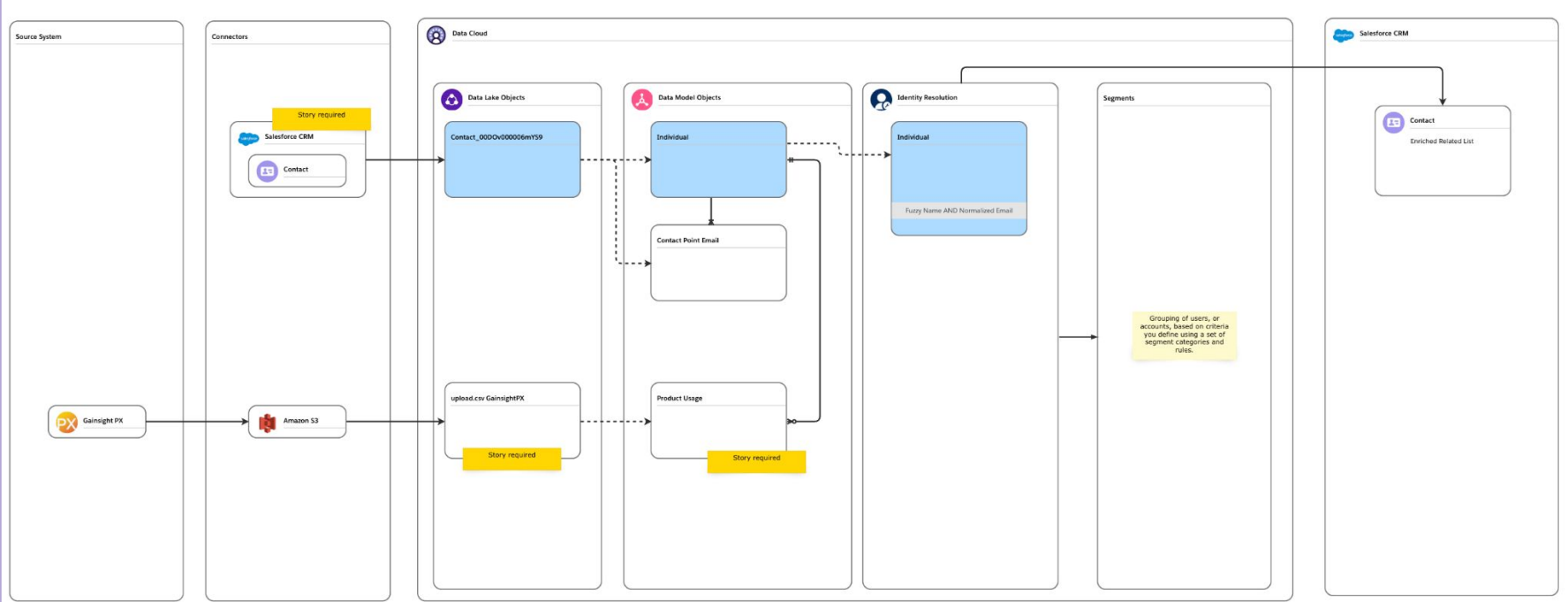
Context DFD for the use case



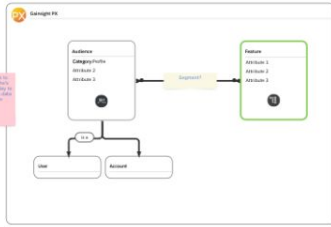
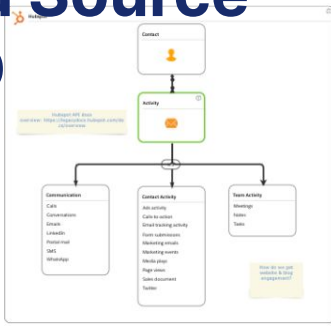
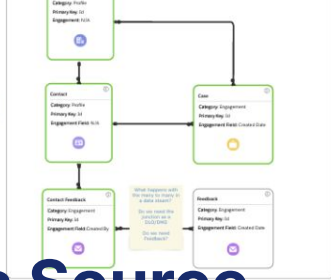
Detailed DFD/ERD for the use case

DFD - Product Usage

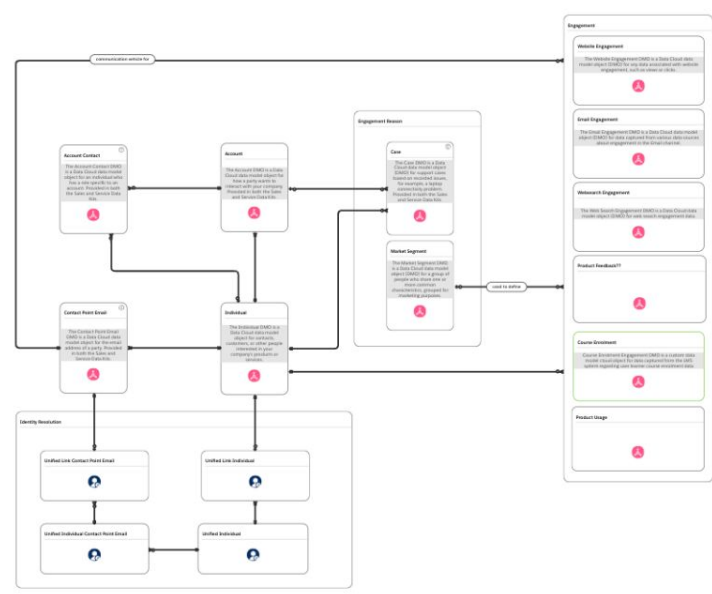
Data flow diagram for the product usage data cloud use case



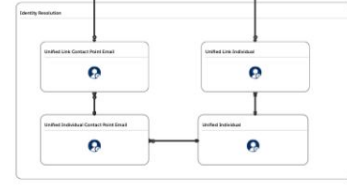
Data Source DSO



Data Lake DLO



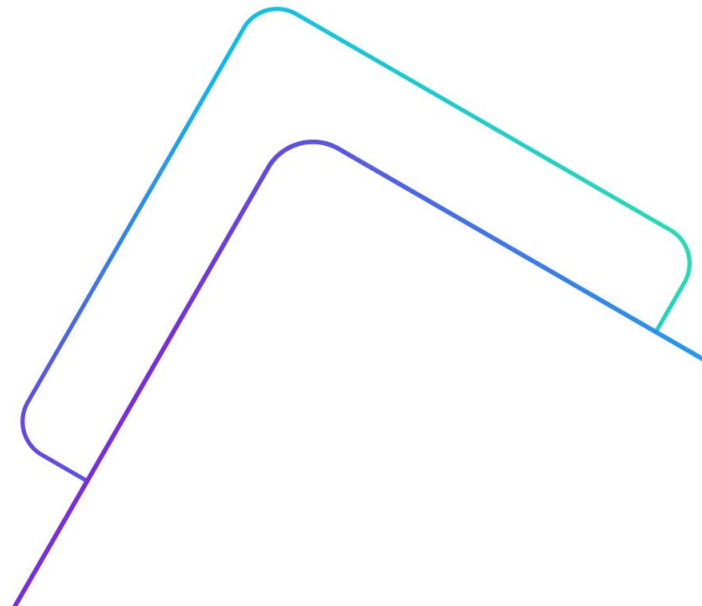
Data Model DMO



Five key takeaways



- 1. Data Cloud is complex**
- 2. It's all about the use case**
- 3. Consumption based cost model**
- 4. Apply 80/20**
- 5. Data Cloud is the future**



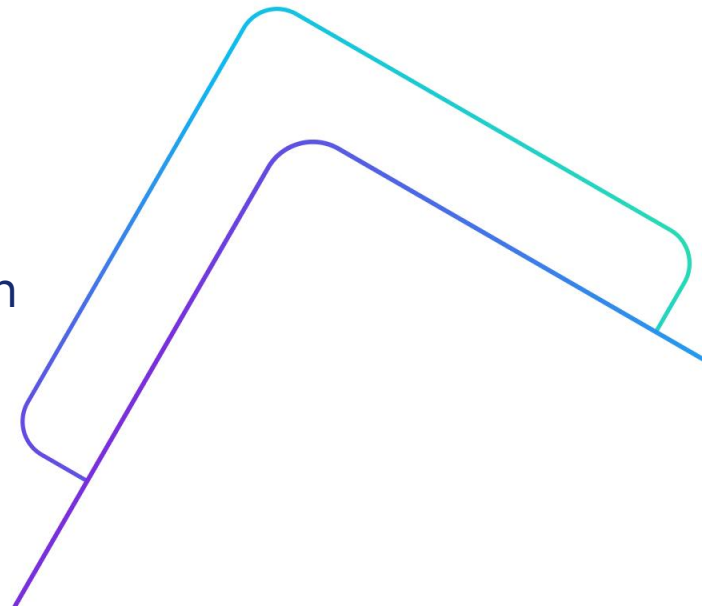
1. Data Cloud is complex

Spend the time to understand Data Cloud before you start

Don't try to learn on your first real implementation

Make sure you really understand each of the concepts

Technically configuring Data Cloud is easy - when you know what to click.

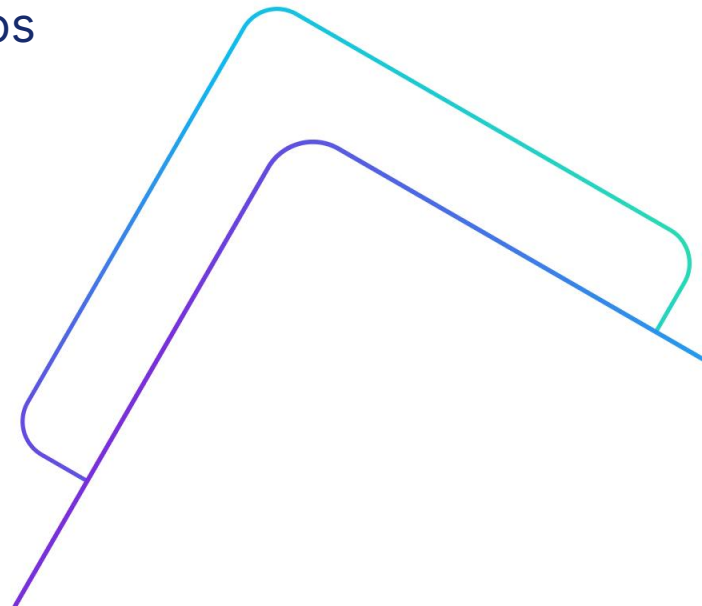


2. It's all about the use case

It is easy to get focused on the technology

Remember it is all about the use cases

You have to break down preconceived mental silos
about your data



3. Consumption based cost model

It is essential that you develop a volumetric model of the use case

You can then work out the cost of the solution

The cost may not justify the use case

Is there an ROI?



Data Cloud Credit Consumption Guide

	Services	Type	Consumption Per 1M Rows Processed, Accessed, or Changed
1	Data Ingestion	Batch	2,000 DS Credits
		Streaming	5,000 DS Credits
	Calculated Insights	Batch	15 DS Credits
2	Calculated Insights	Streaming	800 DS Credits
		Profile Unification	Batch
3	Profile Unification	Batch	100,000 DS Credits
4	Data Actions	Streaming	800 DS Credits
5	Data Queries	N/A	2 DS Credits
6	Accelerated Queries	N/A	2 DS Credits
7	Real-time Profile API	N/A	900 DS Credits
8	Segmentation	Batch	10 S&A Credits
9	Activation	Batch	20 S&A Credits

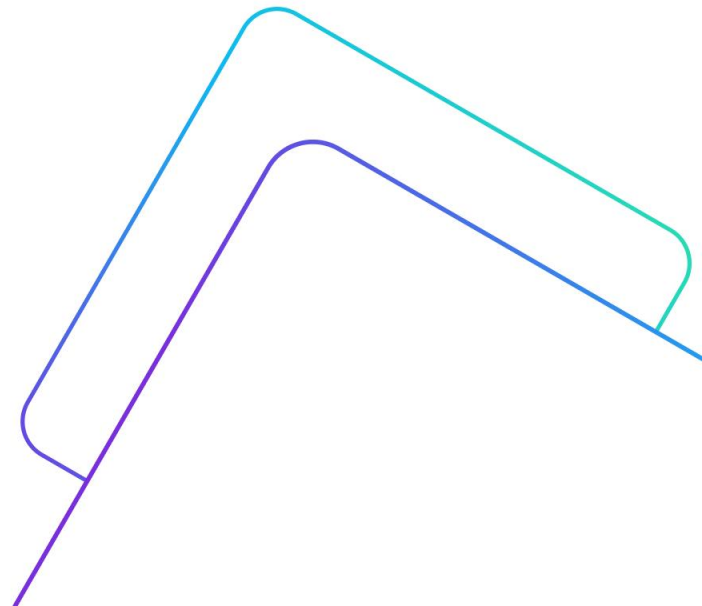
Category	Service	Credits
Connect	Data Ingestion	1
	Integration	✓
	BYO Data Model	
Harmonize	Data Model Objects	*
	Profile Unification	3
	Data Lake Objects	*
	Calculated Insights	2
Predict, Analyze & Act	Data Actions	4
	Data Queries	5
	Accelerated Queries	6
	Segmentation	8
	Activations	9
	Real-time Profile API	7

* Data Storage is measured separately but most customers have been ok w/ the base Data Storage

4. Apply 80/20

Spend 80% of your time on planning (analysis, design, volumetric analysis...)

Spend 20% of your time on implementation

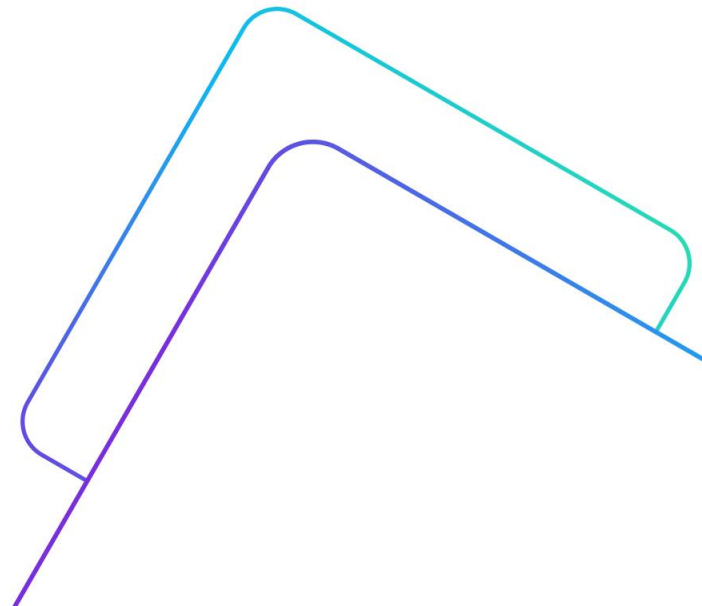


5. Data Cloud is the future

Data cloud is not a small add-on

It is the future of the Salesforce platform

Everybody needs to understand the value





Panel Session

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THE CHANGE INTELLIGENCE PLATFORM



Panelists



Gina Marques

Director, Enterprise Architecture



Ciara Skiles

Senior Director Professional Services



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