

# Preparing for Data Cloud



**Adrian King**

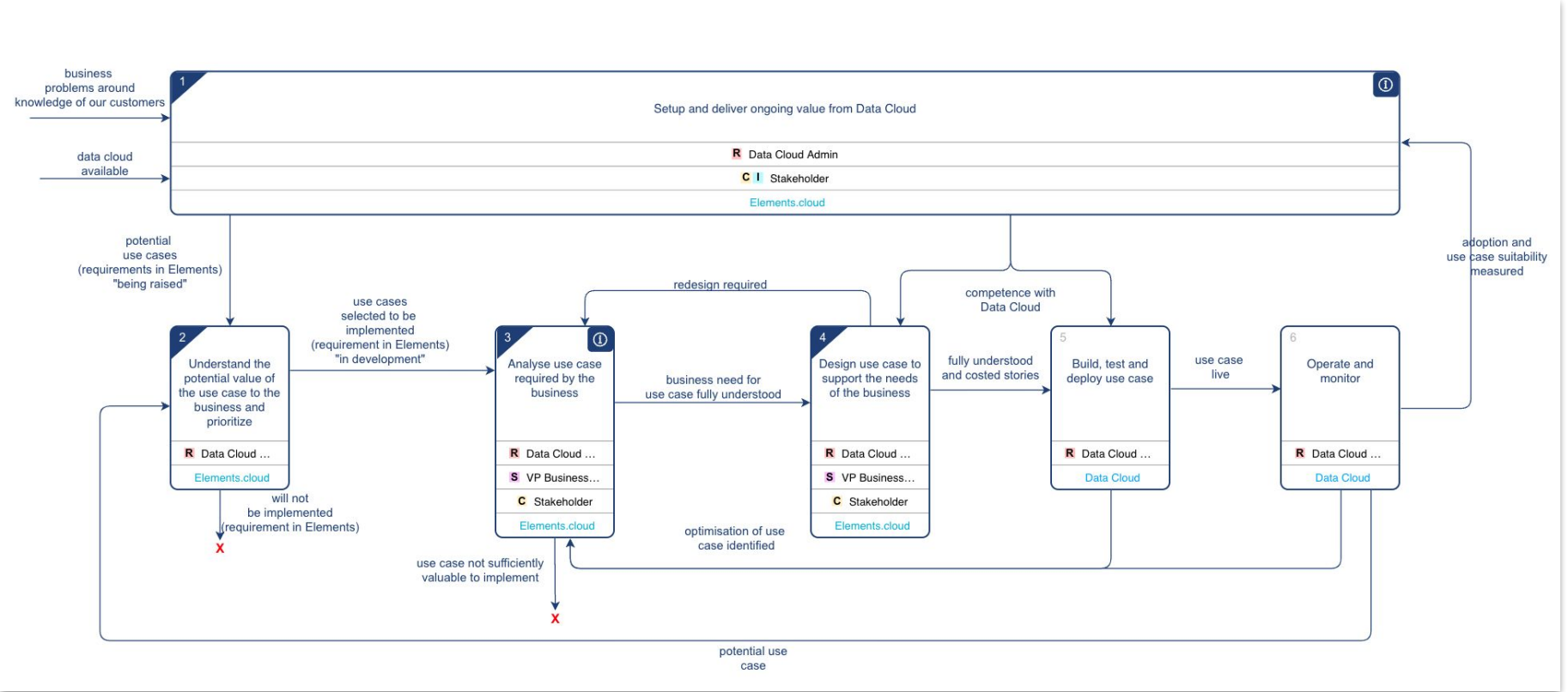
Founder, CTO



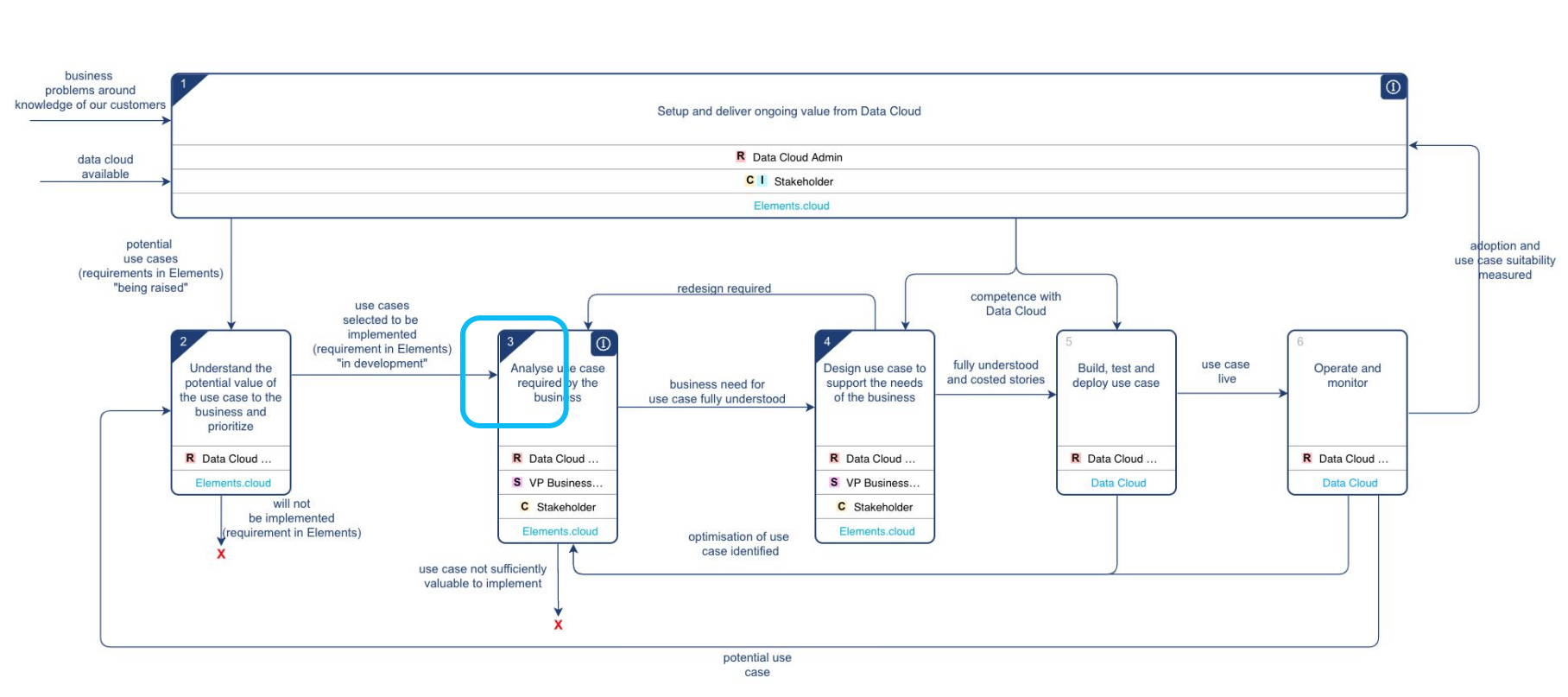
# Data Cloud Implementation Approach



# The methodology as a UPN Process



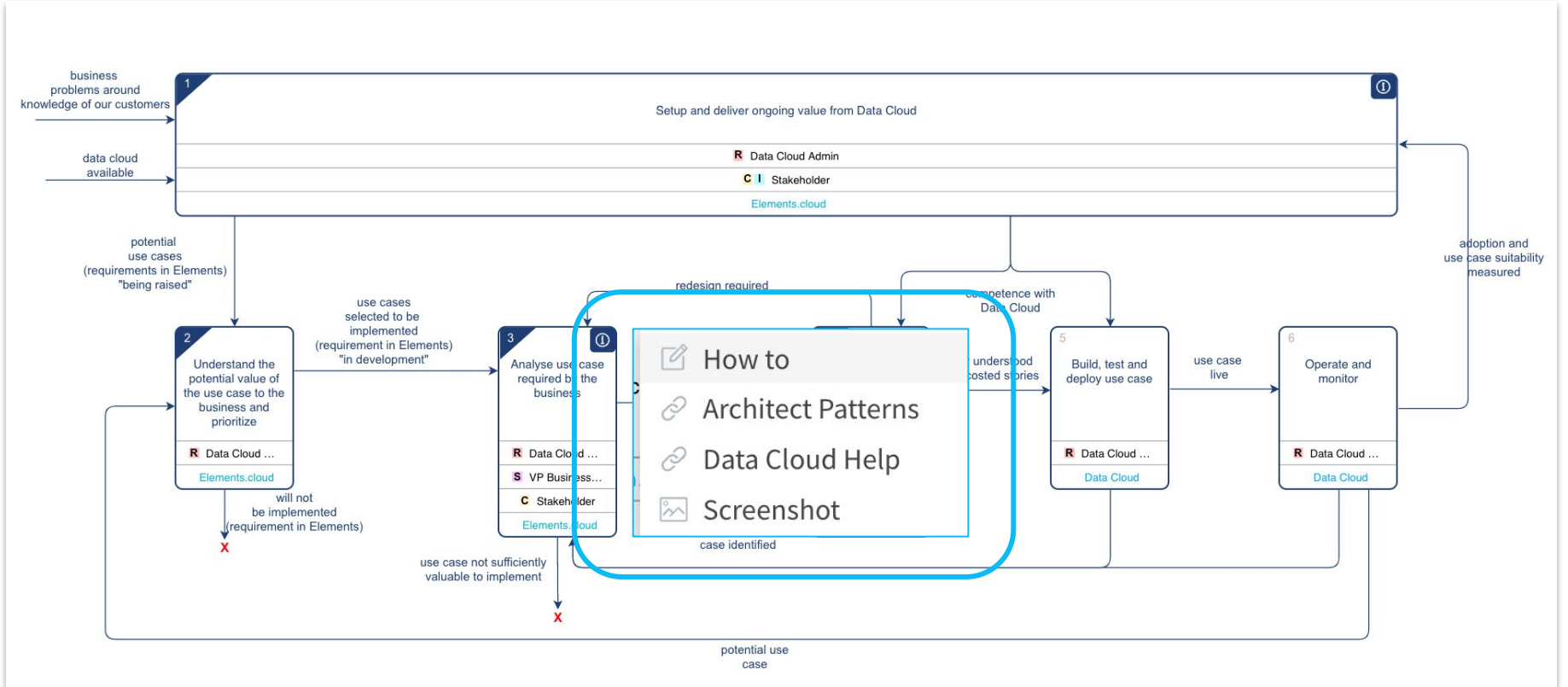
# The methodology as a UPN Process







# Attachments link to supporting content









# Capture the Use Cases as Requirements

The screenshot displays the Azure DevOps Requirements tool interface. The top navigation bar includes 'Home', 'Diagrams', 'Changes', 'Salesforce Orgs', 'Ref Models', 'URL Library', and 'Releases'. The main content area shows a table of requirements under the 'Elements Operations' space. The table has columns for 'Summary', 'ID', 'Assigned to', and 'What is required'. The selected requirement is 'Contact value score using data from multiple sources' with ID 814. The sidebar on the right provides actions for the selected requirement, including 'Edit requirement', 'Change status', 'Add documentation', and 'Copy requirement'. It also lists 'Links' such as 'Context Diagram - Contact Value Scoring', 'Logical ERD - Contact Value Scoring', 'DFD - Contact Value Scoring', and 'E2E - Contact Value Scoring'.

Summary	ID	Assigned to	What is required
<input type="checkbox"/> Displaying Data Cloud Segmentations in HubSpot List Views	820	[User]	salesforce data cloud directly into hubspot, where it will be displayed as cu...
<input type="checkbox"/> Marketing Engagement Data Integration on Salesforce Contact Records	819	[User]	engagement metrics such as email interactions, content downloads, and w...
<input type="checkbox"/> Contact Record Integration with Product Usage Data	818	[User]	contact-specific product usage data directly on the salesforce platform. by...
<input checked="" type="checkbox"/> Contact value score using data from multiple sources	814	[User]	and engagement level of a contact across multiple areas of the business an...



# Capture the Use Cases as Requirements

The screenshot displays the Azure DevOps Requirements tool interface. The top navigation bar includes 'Home', 'Diagrams', 'Changes', 'Salesforce Orgs', 'Ref Models', 'URL Library', and 'Releases'. The main content area is titled 'Elements Operations' and features tabs for 'REQUIREMENTS', 'STORIES', and 'FEEDBACK'. A 'Grid views' dropdown is set to 'All'. Below this is a table of requirements:

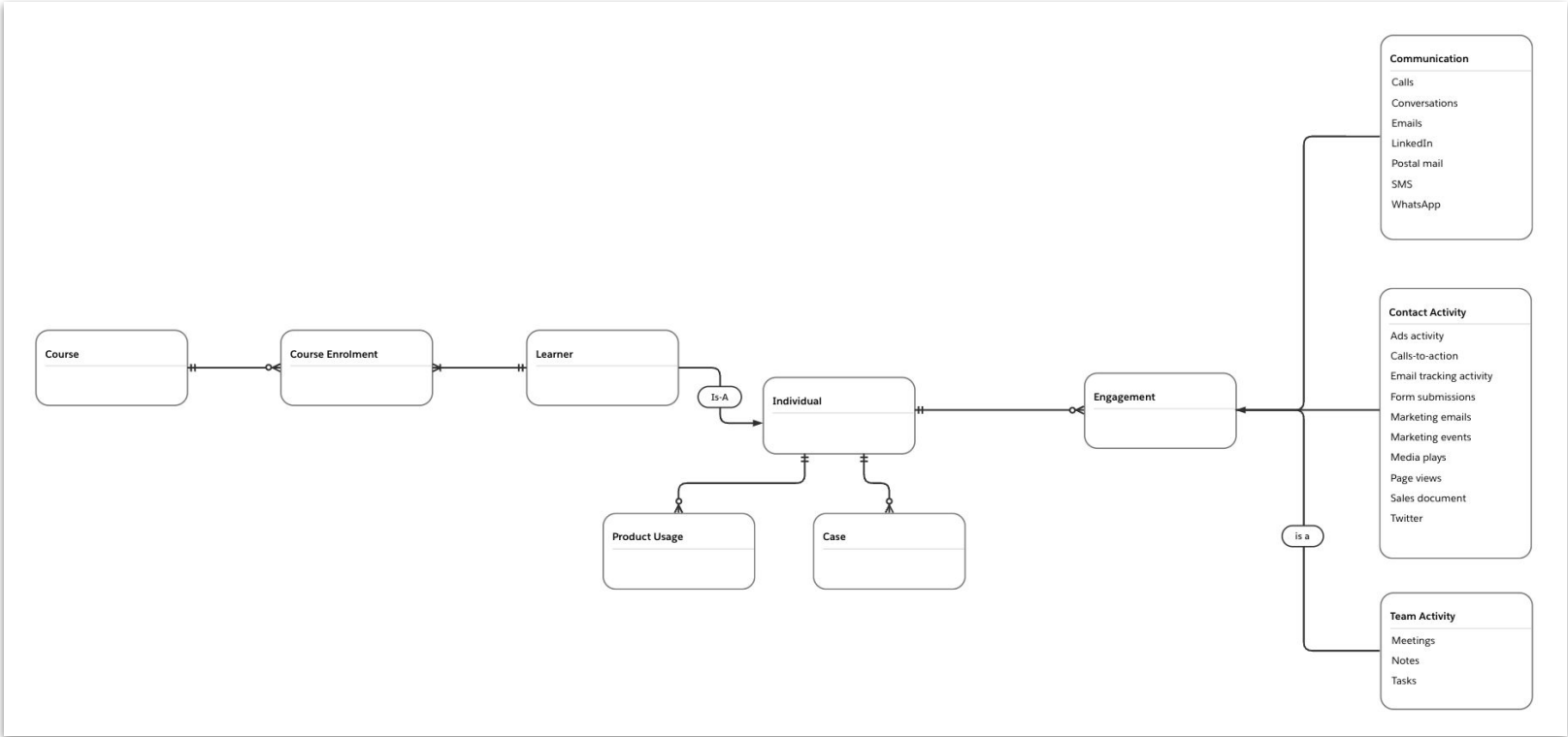
Summary	ID	Assigned to	What is required
<input type="checkbox"/> Displaying Data Cloud Segmentations in HubSpot List Views	820	[User Avatar]	salesforce data cloud directly into hubspot, where it will be displayed as cu...
<input type="checkbox"/> Marketing Engagement Data Integration on Salesforce Contact Records	819	[User Avatar]	engagement metrics such as email interactions, content downloads, and w...
<input type="checkbox"/> Contact Record Integration with Product Usage Data	818	[User Avatar]	contact-specific product usage data directly on the salesforce platform. by...
<input checked="" type="checkbox"/> Contact value score using data from multiple sources	814	[User Avatar]	each contact record, salesforce users can obtain a holistic view of a conta... and engagement level of a contact across multiple areas of the business... contact value score. We want to be able to segment the data to provide th... experience in the following way: For example if we can see that they are...

On the right side, a panel for the selected requirement 'Contact value score using data f...' is visible. It includes buttons for 'Edit requirement' and 'Change status', along with 'Add documentation' and 'Copy requirement'. A 'Links' section is highlighted with a blue box, listing several diagrams linked to this requirement:

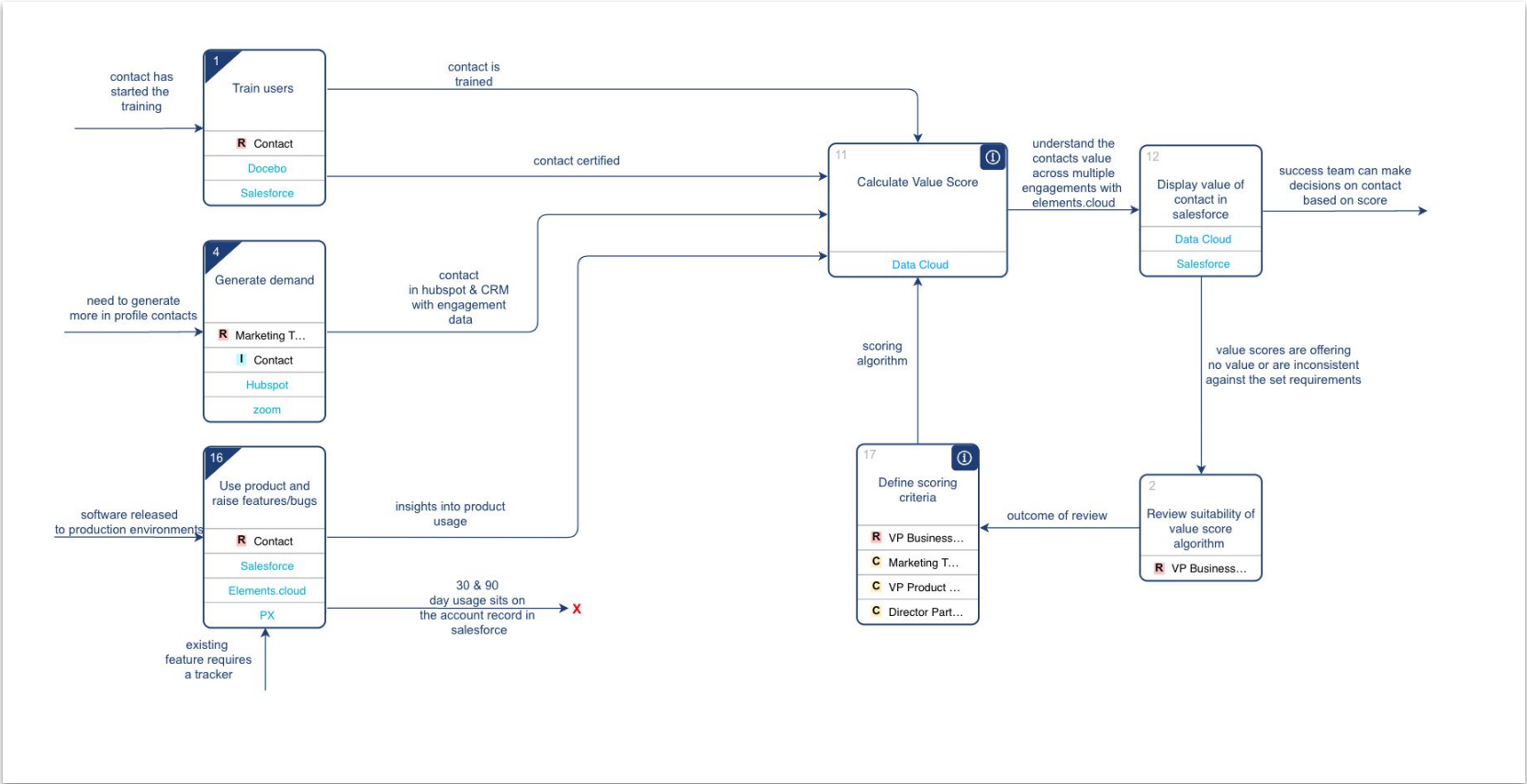
- Context Diagram - Contact Value Scoring
- Logical ERD - Contact Value Scoring
- DFD - Contact Value Scoring
- E2E - Contact Value Scoring



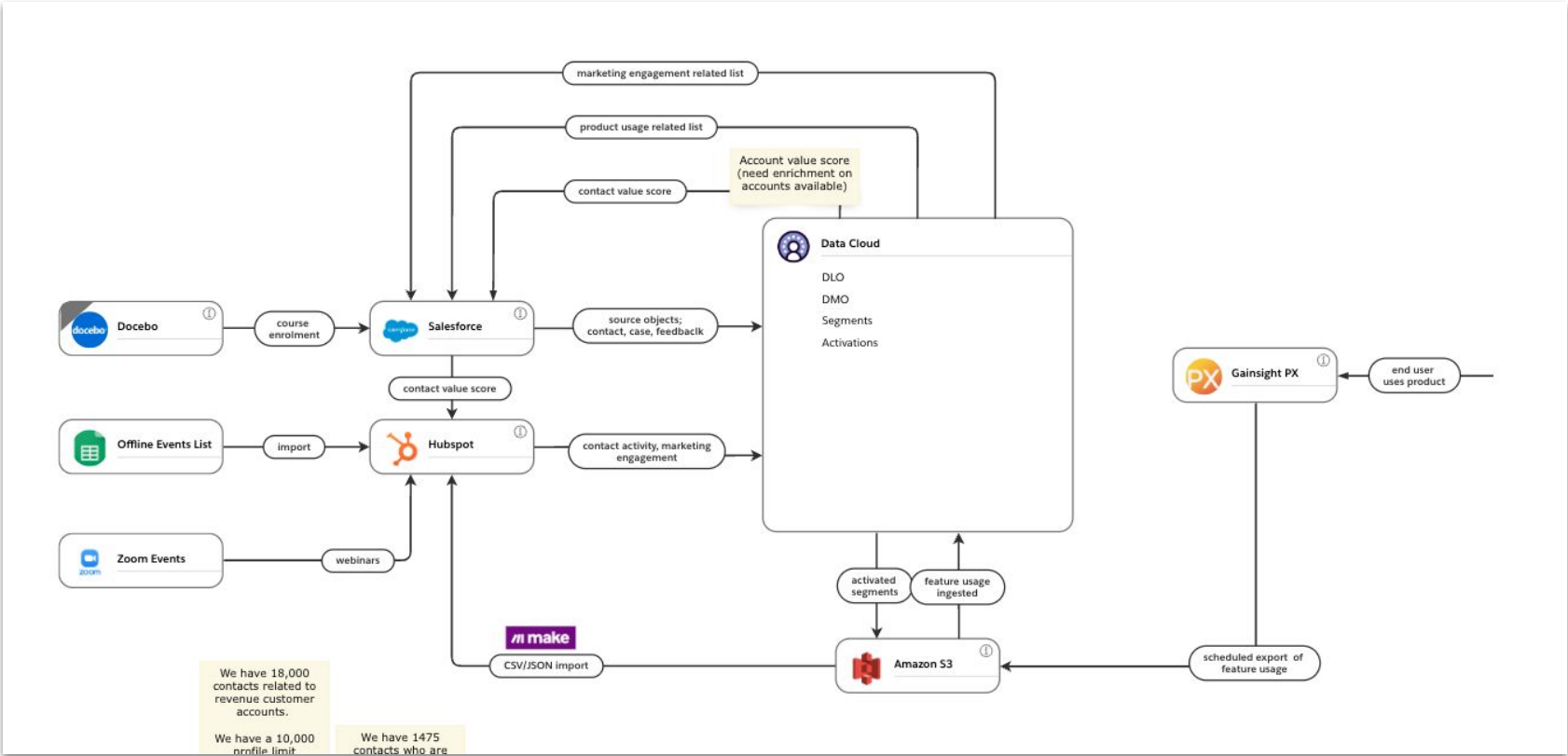
# Create a Logical ERD for each Use Case



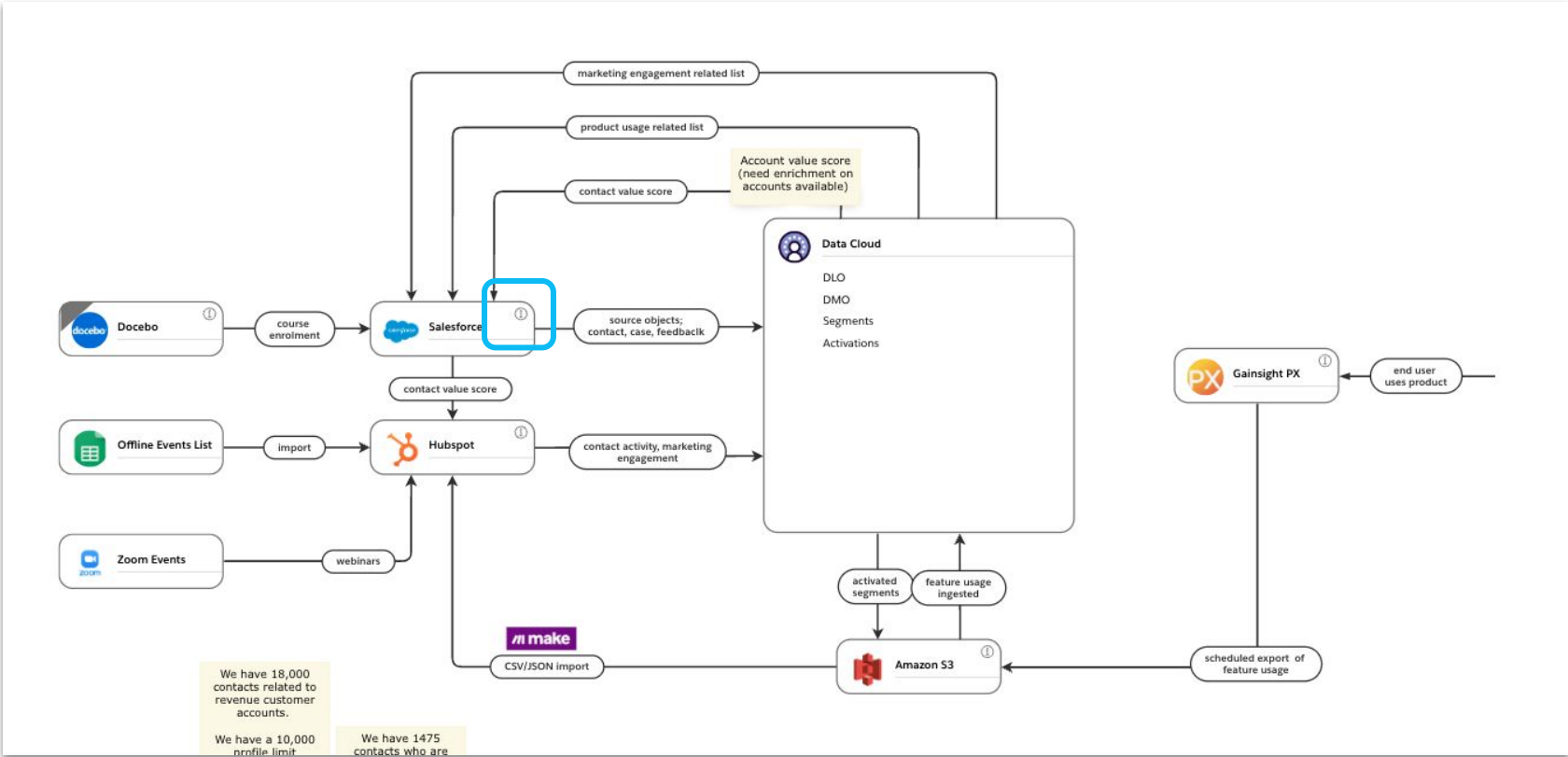
# Create an End to End process for each Use Case



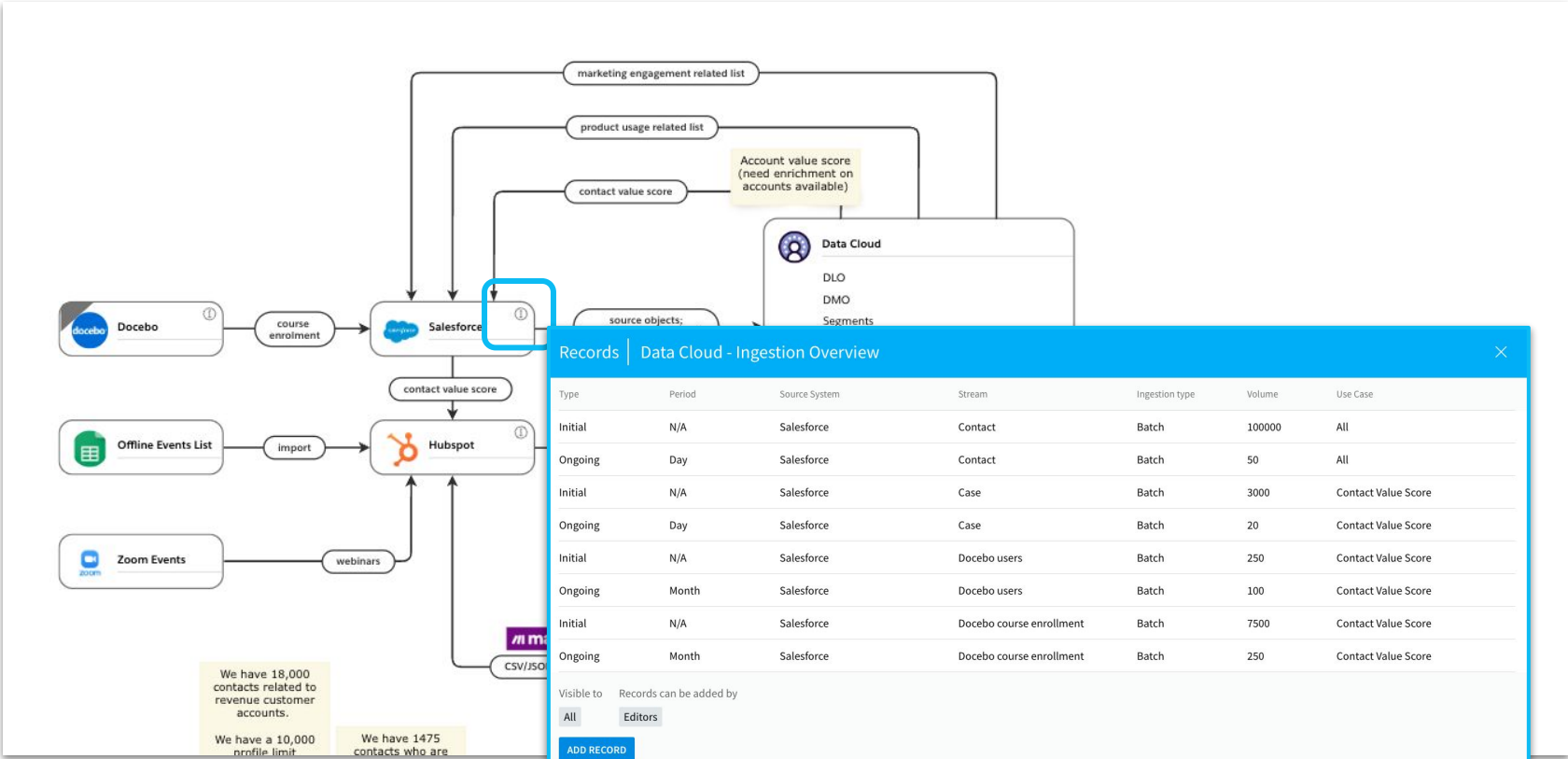
# Create the Context DFD



# Create the Context DFD

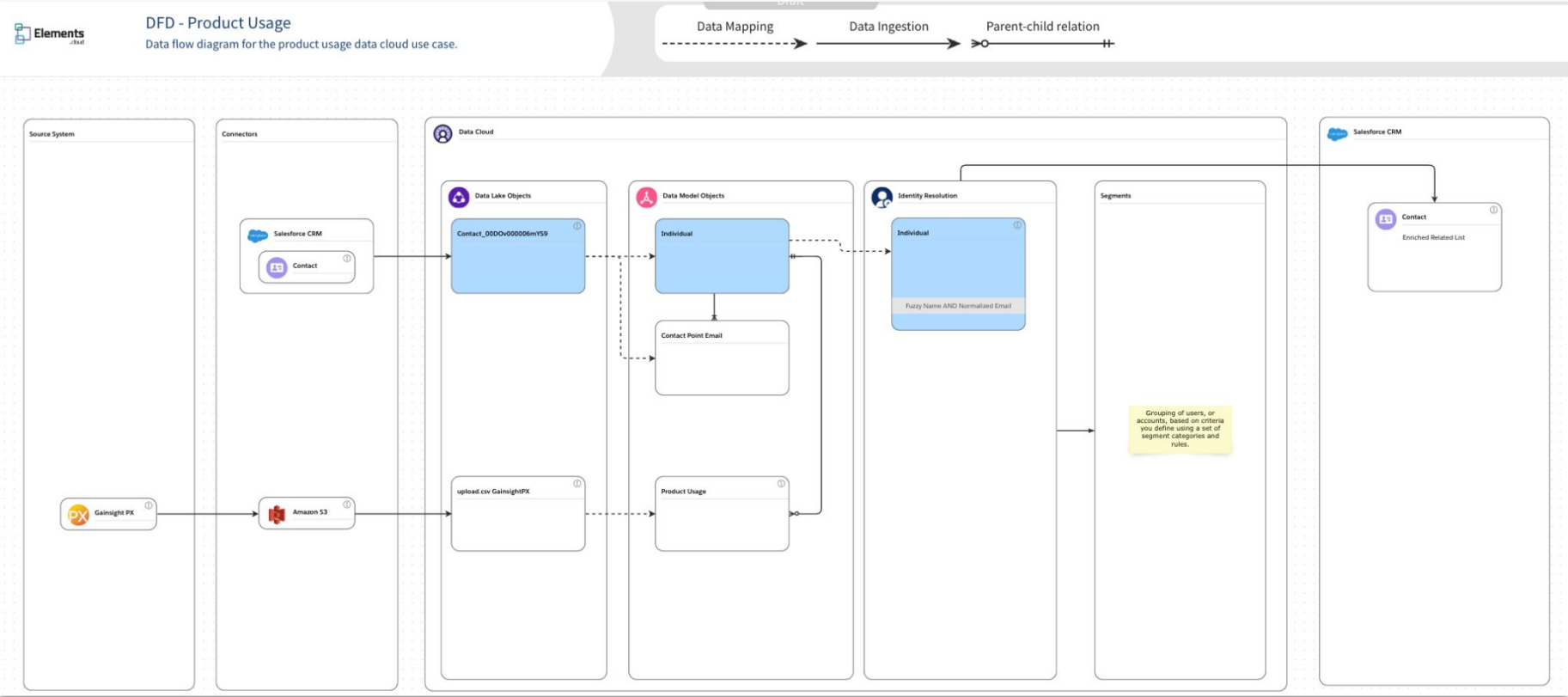


# Create the Context DFD

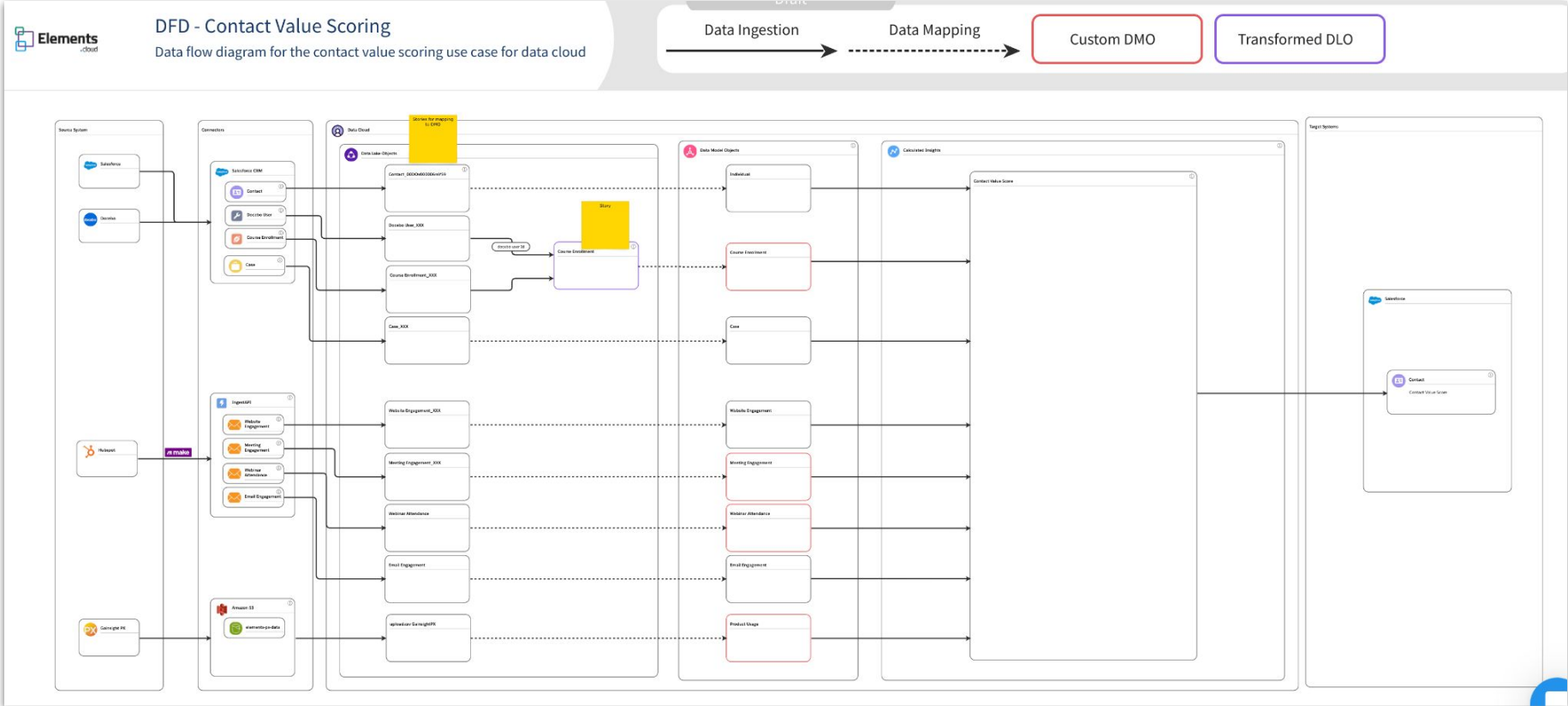




# Create the Detailed DFD for each Use Case



# Create the Detailed DFD - use case 2



# Add detailed Data Source volumetrics

**Elements** DFD - Product Usage  
Data flow diagram for the product

Data Mapping | Data Ingestion | Parent-child relation

### < Add record | Data Cloud - Volumetric Planning

Type\*  
Ongoing

Period\*  
Day

Service\*  
Calculated Insights

- Data Ingestion
- Calculated Insights**
- Profile Unification
- Data Action
- Data Query
- Accelerated Queries
- Real-time Profile API
- Segmentation
- Activation

SAVE AND ADD ANOTHER RECORD

CANCEL ADD RECORD

Source System

Connectors

Salesforce CRM

Contact

Gainight PX

Amazon

Salesforce CRM

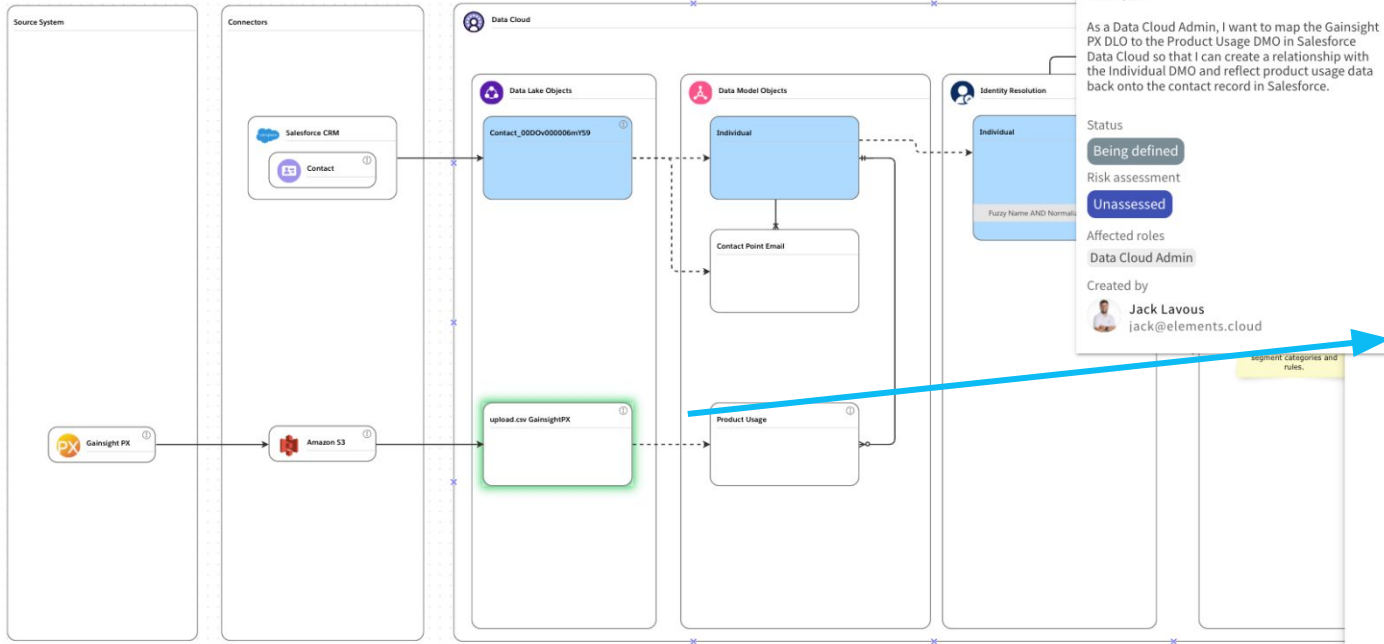
Contact

Enriched Related List

# Create User Stories from Detailed DFD



DFD - Product Usage  
Data flow diagram for the product usage data cloud use case.



**ELEM-3082: Map Gainsight PX DLO to Product Usage DMO in Salesforce**

Description  
As a Data Cloud Admin, I want to map the Gainsight PX DLO to the Product Usage DMO in Salesforce Data Cloud so that I can create a relationship with the Individual DMO and reflect product usage data back onto the contact record in Salesforce.

Status: **Being defined**

Risk assessment: **Unassessed**

Affected roles: **Data Cloud Admin**

Created by: **Jack Lavous** (jack@elements.cloud)

DFD - Product Usage

Stories list

- 3082: Map Gainsight PX DLO to Product Usage DMO ... **Being defined**
- 3080: Mapping Contact DLO to Individual and Conta... **Being defined**
- 3075: Connect Salesforce CRM contact data stream **Being defined**
- 3034: Create Custom DMO for Product Usage in Sale... **Ready for release**
- 3017: Implement Identity Resolution for Individual ... **Ready for release**
- 3013: Product usage data visible on contact in Sales... **In design**

# User Stories for required for Use Case

Elements Operations									
Change space									
REQUIREMENTS STORIES FEEDBACK									
Grid views: All									
ADD NEW RESET FILTERS IMPORT									
Summary	Story Id	Assigned to	Description	Affected roles	Acceptance Criteria	Status	Risk		
<input type="checkbox"/> Map Gainsight PX DLO to Product Usage DMO in Salesforce	3082		DLO to the Product Usage DMO in Salesforce Data Cloud so that I can create a relationship with the Individual DMO and reflect product usage data back	Data Cloud Admin	Product Usage DMO in Salesforce Data Cloud. A relationship is established between the Product	Being defined	Unassessed		
<input type="checkbox"/> Mapping Contact DLO to Individual and Contact Point Email DMO for the product usage use case	3080		Salesforce Data Cloud so that I can unify contact and individual records, ensuring a holistic understanding of	Data Cloud Admin	See image attached to user story.	Being defined	High		
<input type="checkbox"/> Connect Salesforce CRM contact data stream	3075		contact data into Data Cloud. The contact data is key to implementing our Product Usage use case as it will	Data Cloud Admin	A data stream is created in Salesforce Data Cloud specifically for Contact data from Salesforce CRM.	Being defined	High		
<input type="checkbox"/> Create Custom DMO for Product Usage in Salesforce Data Cloud	3034		define its required fields, so that I can take the data ingested into the Gainsight PX DLO and use it within	Data Cloud Admin	Salesforce Data Cloud.Validation:The "Product Usage" DMO correctly stores and displays data as per	Ready for release	Medium		
<input checked="" type="checkbox"/> Implement Identity Resolution for Individual Product Usage Insights	3017		the relationship of the Product Usage DMO and the Contact DMO, so that I can accurately link product		usage data to individual product use cases	Ready for release	Medium		
<input type="checkbox"/> Product usage data visible on contact in Salesforce Org	3013		that we don't have to navigate two different systems to get the usage data. It will allow us to have better			In design	Medium		

# Org metadata dictionary

Data: Salesforce config  
This is the config to our production Salesforce Org (Production)

App Metadata views Select your view All types and Search by label or api Ask Org Copilot Analytics 360

Data: Salesforce config Last synced on: July 4, 2024 at 03:01

Name	Status	# of links	Data privacy	Optimization	Field impact	Tags
▶ Muting Permission Sets		0				
▶ Named Credentials		0				
▼ Objects		0				
▶ Custom Metadata		0				
▶ Custom Objects		0				
▶ External Objects		0				
▼ Standard Objects		0				
▶ Account		51		Unassessed		DocumentationAudit
▶ Account Contact Relationship		0		Unassessed		
▶ Address		0		Optimize potential		
▶ Asset		1		Unassessed		
▶ Asset Relationship		0		Unassessed		
▶ Associated Location		0		Unassessed		
▶ Authorization Form		0		Unassessed		

Account Stakeholder (4) Add stakeholder

Richard Parker richard@elements.cloud  
As the owner of the Account object, Richard is the person who is ultimately accountable for the metadata and data stored within.

Adrian King adrian@elements.cloud  
The naming convention and hierarchy are

Details

Salesforce API name

Account

Description  
No description

POST

Node type  
Standard Object

Summary

0	31	1
Approval Processes	Buttons Links And Actions	Compact Layouts

# Org metadata extended for Data Cloud objects

Data: Salesforce config  
This is the config to our production Salesforce Org (Production)

App Metadata views Select your view All types and Search by label or api Ask Org Copilot Analytics 360

Data: Salesforce config Last synced on: July 4, 2024 at 03:01

Name		
▶ Muting Permission Sets		
▶ Named Credentials		
▼ Objects		
▶ Custom Metadata		
▶ Custom Objects		
▶ External Objects		
▼ Standard Objects		
▶ Account		
▶ Account Contact Relationship		
▶ Address		
▶ Asset		
▶ Asset Relationship		
▶ Associated Location	0	Unassessed
▶ Authorization Form	0	Unassessed

### ▼ Data Lake Objects

- ▶ Account Transform
- ▶ Account\_00DHn000001Pppg
- ▶ Account\_00DHP000004AmGn
- ▶ Campaign\_00DHP000004AmGn
- ▶ Community\_00DHn000001Pppg
- ▶ Contact\_00DHn000001Pppg
- ▶ Contact\_00DHP000004AmGn

Account

Stakeholder (4)

Add stakeholder

Richard Parker  
richard@elements.cloud

As the owner of the Account object, Richard is the person who is ultimately accountable for the metadata and data stored within.

Adrian King  
adrian@elements.cloud

The naming convention and hierarchy are

Details

Salesforce API name

Account

Description  
No description

POST

Node type  
Standard Object

Summary

0	31	1
Approval Processes	Buttons Links And Actions	Compact Layouts



# Extended to support the Data Cloud metadata

00DHp000004AmGn  
(Production)

App Metadata views  
Select your view  All types  Search by label or api

00DHp000004AmGn

Name	Status	# of links
▼ Data Lake Objects		0
▸ Account Transform		0
▸ Account_00DHn000001Pppg		0
▸ Account_00DHp000004AmGn		0
▸ Campaign_00DHp000004AmGn		0
▸ Community_00DHn000001Pppg		0
▸ Contact_00DHn000001Pppg		0
▸ Contact_00DHp000004AmGn		0

# Link metadata to the User Stories

The screenshot shows a software interface with a sidebar on the left containing navigation options: Home, Diagrams, Changes, Salesforce Orgs, Ref Models, URL Library, and Releases. The main area is titled 'Elements Operations' and has tabs for 'REQUIREMENTS', 'STORIES', and 'FEEDBACK'. A table of user stories is visible, with the following data:

Summary	Story
<input type="checkbox"/> Mapping Contact DLO to Individual DMO	3057
<input type="checkbox"/> Data Stream for Case Data in Salesforce Data Cloud	3055
<input type="checkbox"/> Creating a Data Stream for Course Enrollment Data	3054
<input type="checkbox"/> Salesforce CRM Data Stream for Docebo User Data	3053
<input type="checkbox"/> Create Data Stream for Contact Data in Salesforce Data Cloud	3048
<input type="checkbox"/> Calculated Insight for contact value score	3047
<input type="checkbox"/> Displaying value of contact in Salesforce	3046
<input type="checkbox"/> Ingestion of email engagement data from Hubspot	3044
<input type="checkbox"/> Ingestion of webinar attendance data into our Data Cloud environment	3043
<input type="checkbox"/> Ingestion of website page views from Hubspot into Data Cloud	2979
<input checked="" type="checkbox"/> Ingestion of Hubspot meetings data into Data Cloud environment	2978

A modal dialog box titled 'Find Salesforce node' is open in the center. It features a search bar with the text 'Flow and cont' and a dropdown menu for 'Org Models' set to 'Data: Salesforce config'. Below the search bar is a table with two columns: 'Name' and 'Path'. The table contains two entries:

Name	Path
<input type="checkbox"/> Contact In Research Becomes Participant	Flows/Contact In Research Becomes Participant
<input type="checkbox"/> Contact Role/Persona Synchronisation	Flows/Contact Role/Persona Synchronisation

At the bottom of the dialog are 'CANCEL' and 'ADD TO STORY' buttons. In the background, a user story titled 'Ingestion of Hubspot meetings ...' is visible, with buttons for 'Edit story' and 'Change status', and a message stating 'No Org Model nodes linked to this story'.

# Link existing metadata to User Stories

The screenshot shows a user story management interface. The top navigation bar includes 'Home', 'Diagrams', 'Changes', 'Salesforce Orgs', 'Ref Models', 'URL Library', and a notification bell. The main content area is titled 'Elements Operations' and has tabs for 'REQUIREMENTS', 'STORIES', and 'FEEDBACK'. A 'Grid views' dropdown is set to 'All'. On the right, there are buttons for 'ADD NEW', 'RESET FILTERS', and 'IMPORT'. The table below lists several user stories, with the one 'Implement Identity Resolution for Individual Product Usage Insights' selected.

Summary	Story Id	Assigned to	Description	Affected roles	Acceptance Criteria	Status	Risk
<input type="checkbox"/> Map Gainsight PX DLO to Product Usage DMO in Salesforce	3082		DLO to the Product Usage DMO in Salesforce Data Cloud so that I can create a relationship with the Individual DMO and reflect product usage data back	Data Cloud Admin	Product Usage DMO in Salesforce Data Cloud. A relationship is established between the Product	Being defined	Unassessed
<input type="checkbox"/> Mapping Contact DLO to Individual and Contact Point Email DMO for the product usage use case	3080		Salesforce Data Cloud so that I can unify contact and individual records, ensuring a holistic understanding of	Data Cloud Admin	See image attached to user story.	Being defined	High
<input type="checkbox"/> Connect Salesforce CRM contact data stream	3075		contact data into Data Cloud. The contact data is key to implementing our Product Usage use case as it will	Data Cloud Admin	A data stream is created in Salesforce Data Cloud specifically for Contact data from Salesforce CRM.	Being defined	High
<input type="checkbox"/> Create Custom DMO for Product Usage in Salesforce Data Cloud	3034		define its required fields, so that I can take the data ingested into the Gainsight PX DLO and use it within	Data Cloud Admin	Salesforce Data Cloud.Validation:The "Product Usage" DMO correctly stores and displays data as per	Ready for release	Medium
<input checked="" type="checkbox"/> Implement Identity Resolution for Individual Product Usage Insights	3017		the relationship of the Product Usage DMO and the Contact DMO, so that I can accurately link product usage data to individual product usage		individual from the product usage DMO to give us a	Ready for release	Medium
<input type="checkbox"/> Product usage data visible on contact in Salesforce Org	3013		that we don't have to navigate two different systems to get the usage data. It will allow us to have better			In design	Medium



# Link proposed metadata to User Stories

Elements Operations

REQUIREMENTS STORIES FEEDBACK

Grid views: All

Summary	Story Id	Assigned to	Description	Affected roles
<input type="checkbox"/> Map Gainsight PX DLO to Product Usage DMO in Salesforce	3082		DLO to the Product Usage DMO in Salesforce Data Cloud so that I can create a relationship with the Individual DMO and reflect product usage data back	Data Cloud Admin
<input type="checkbox"/> Mapping Contact DLO to Individual and Contact Point Email DMO for the product usage use case	3080		Salesforce Data Cloud so that I can unify contact and individual records, ensuring a holistic understanding of	Data Cloud Admin
<input type="checkbox"/> Connect Salesforce CRM contact data stream	3075		contact data into Data Cloud. The contact data is key to implementing our Product Usage use case as it will	Data Cloud Admin
<input type="checkbox"/> Create Custom DMO for Product Usage in Salesforce Data Cloud	3034		define its required fields, so that I can take the data ingested into the Gainsight PX DLO and use it within	Data Cloud Admin
<input checked="" type="checkbox"/> Implement Identity Resolution for Individual Product Usage Insights	3017		the relationship of the Product Usage DMO and the Contact DMO, so that I can accurately link product usage data to Individual product use cases	
<input type="checkbox"/> Product usage data visible on contact in Salesforce Org	3013		that we don't have to navigate two different systems to get the usage data. It will allow us to have better	

Ingestion of Hubspot meetings ...

[Edit story](#) [Change status](#)

[Copy story](#) [Find Salesforce node](#)

**Salesforce nodes:**

**Flow: Contact In Research Be...** To Do

**Contact In Research Becomes Participant**

Type: Flow

**Status**

To Do

**What is planned outcome**

Create

**Description**

4 July 2024  
Flow will be trigger by Platform Event from Data Cloud

ALTERS IMPORT

Risk

Unassessed
High
High
Medium
Medium
Medium

# Create metadata linked to the User Story

The screenshot displays a software interface with two main components: a table of metadata on the left and a detailed view of a user story on the right.

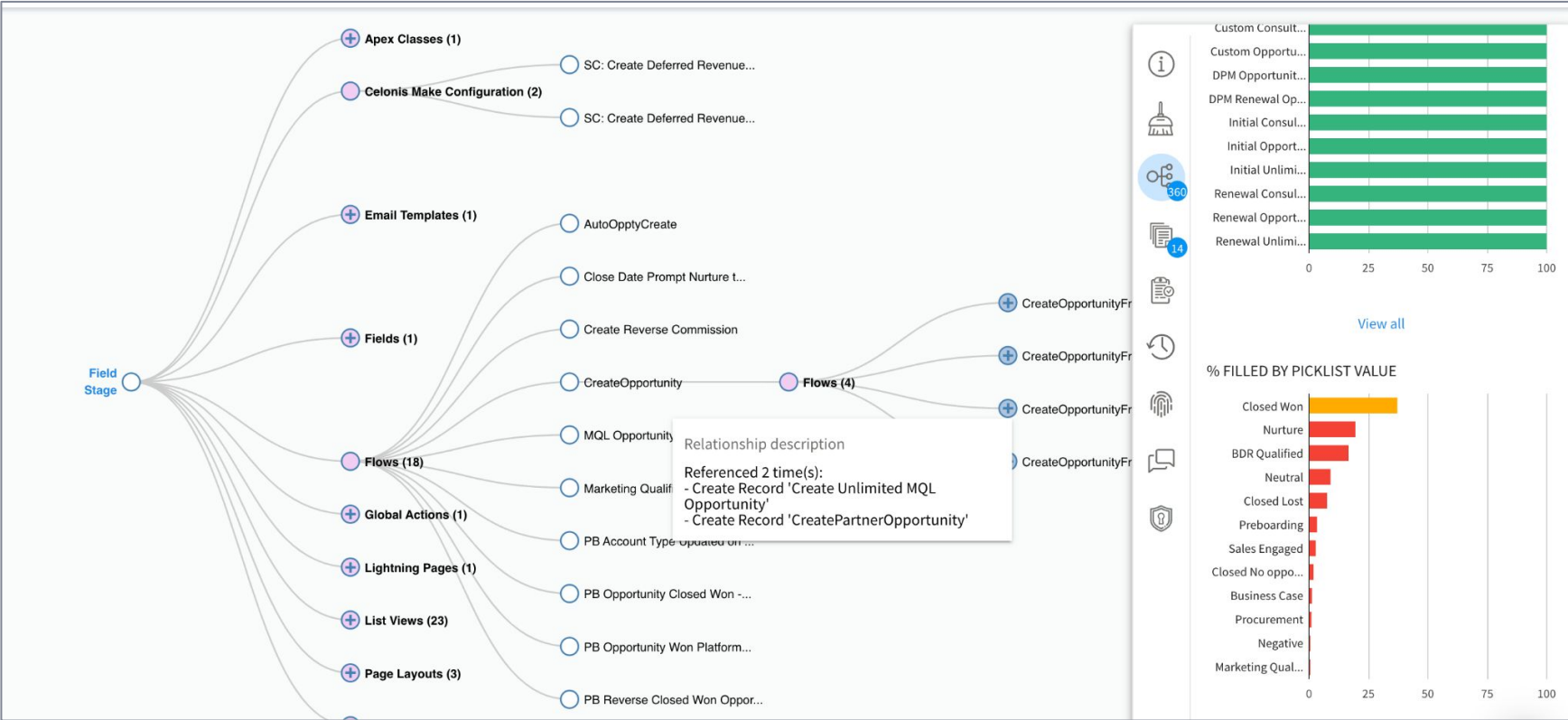
**Table of Metadata:**

Description	Affected roles	Accepted
are individual DM in Salesforce Data Cloud so that I can unify contact and individual records, ensuring a holistic understanding of an individual's interactions	Data Cloud Admin	DMO.The accurate
the case data, particularly cases raised by a particular contact, to contribute to the contact value	Data Cloud Admin	records, Case Ori
Course Enrollment data within the Salesforce CRM, that I can map it to a Data Lake Object (DLO) and		relevant Cloud.Ve
to integrate this information into Data Cloud and to identify which contacts have completed training	Data Cloud Admin	Data Clu includes training
contact data into Data Cloud. The contact data is key to implementing our Contact Value Score use case as it	Data Cloud Admin	A data st specific
omment, Case, website Engagement, marketing engagement, Webinar Attendance, Email Engagement, Product Usage, so that I can gain a comprehensive curated insight in data cloud to display the contact value score of a contact on the contact record in our	Data Cloud Admin	each DM engagem
performance so that the success and sales teams can an engagement data into data cloud so that we can calculate a contact value score using the email engagement data for the success teams to then derive		A unity u scoring e Salesforce
us so that we have that data available for each individual contact within our data cloud environment	Data Cloud Admin	and we g contact
we can then use that data to help us in calculating		webinar data from data clou
est that data into data cloud so that we can later	Data Cloud Admin	when a hubspot
ment on that data and it will give us more data to		will the
available for each contact in data for their meetings	Data Cloud Admin	webhook from the
oked data. we can then use this data to helps us in		

**User Story Detail View:**

- Title:** Ingestion of Hubspot meetings ...
- Buttons:** Edit story, Change status, Copy story, Find Salesforce node
- Salesforce nodes:** Flow: Contact In Research Be... (To Do)
- Flow:** Contact In Research Becomes Participant (Type: Flow)
- Status:** To Do
- What is planned outcome:** Create
- Description:** 4 July 2024. Flow will be trigger by Platform Event from Data Cloud

# Visualize dependencies including Data Cloud





“

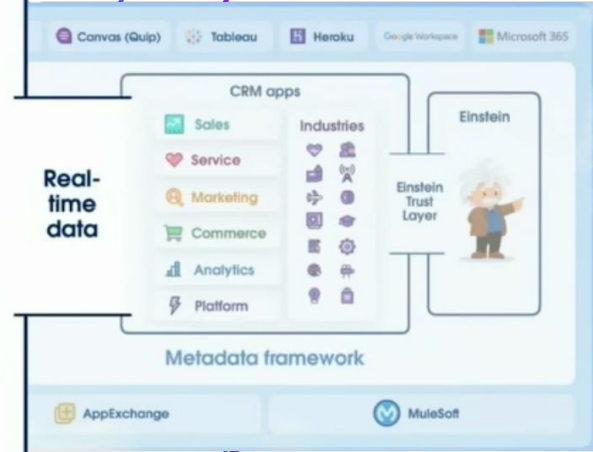
We saw more than 1,000 new Data Cloud purchases in the quarter. That's the second quarter in a row where we saw Data Cloud with more than...

Marc Benioff  
Chair and CEO, Salesforce

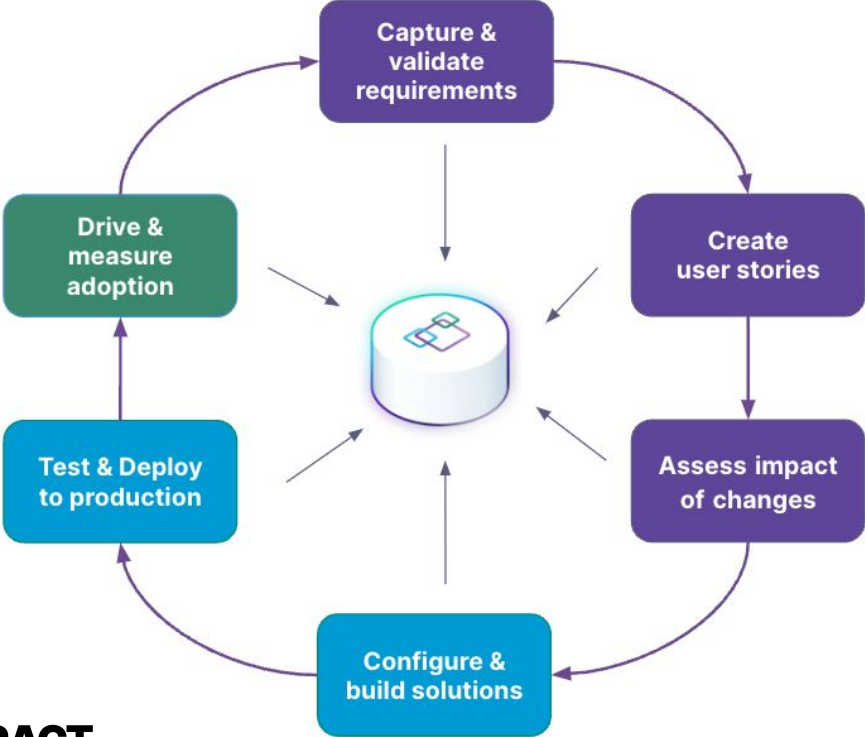


salesforce

# Data Cloud is a step change



# Implementation is the standard lifecycle

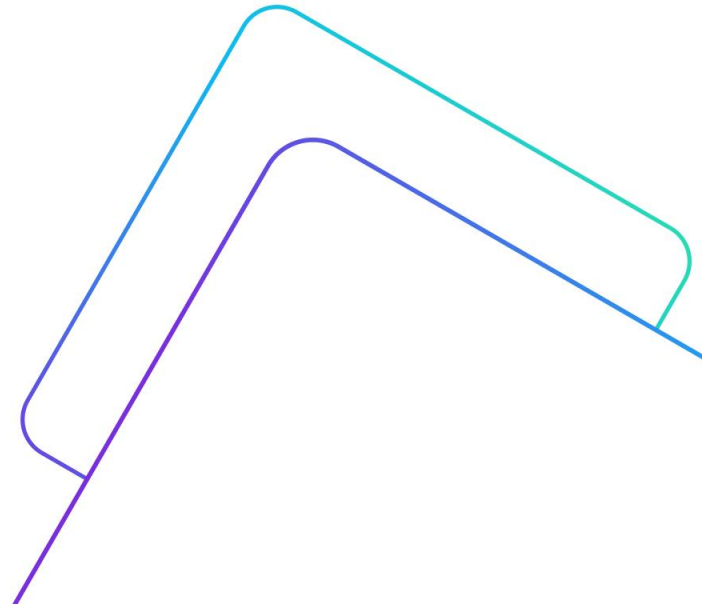


80% - 20%

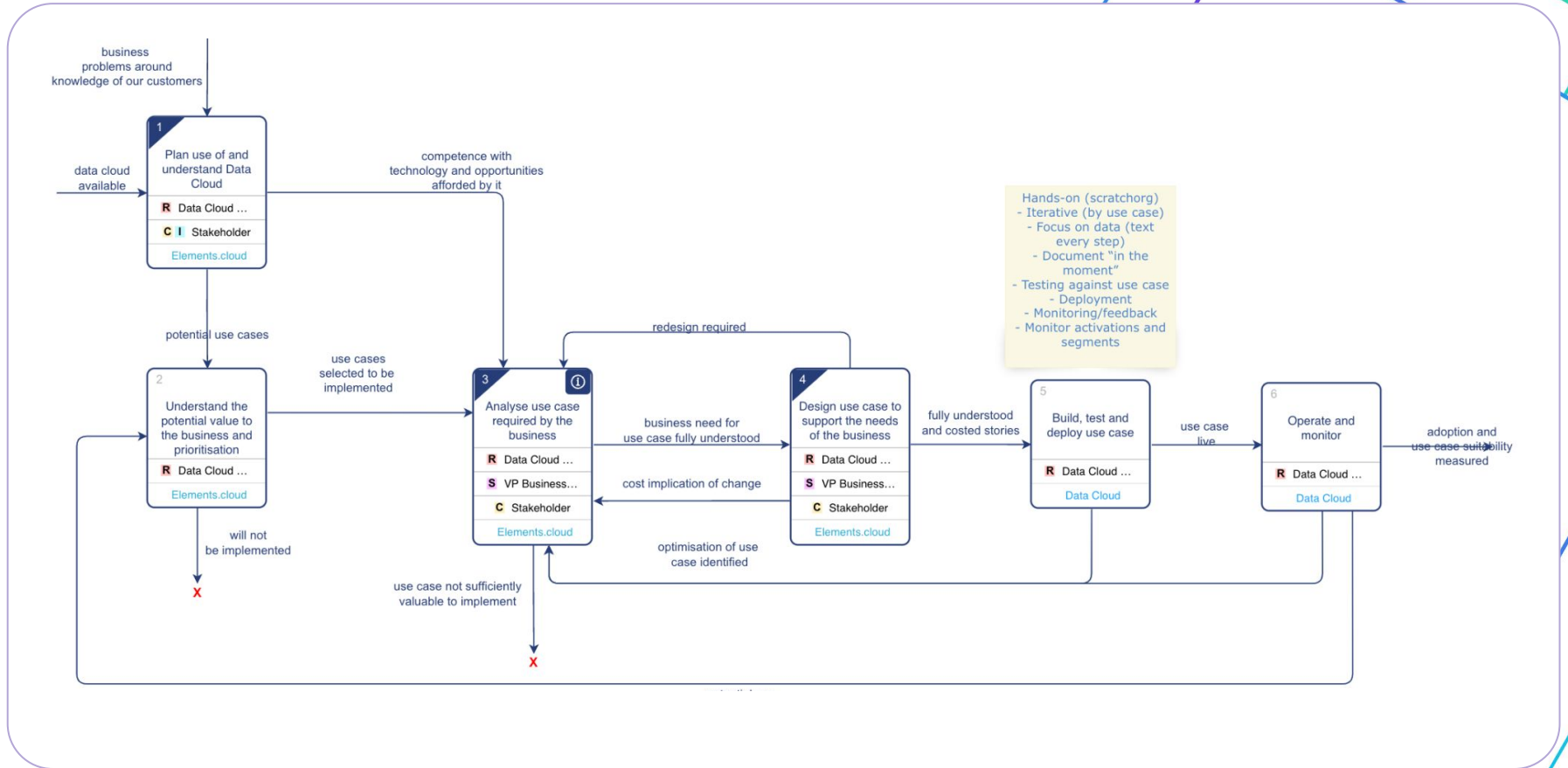
# Focus on the use case

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

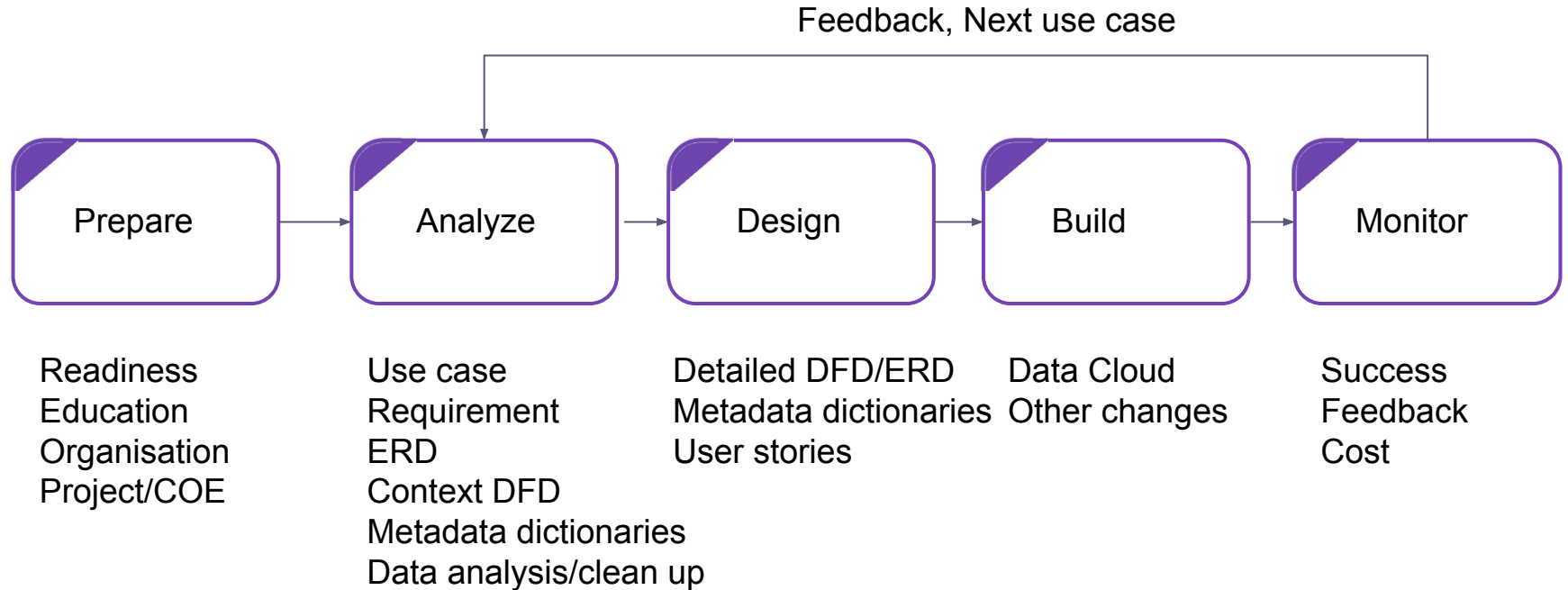
It is all about what you can do with actionable unified data.



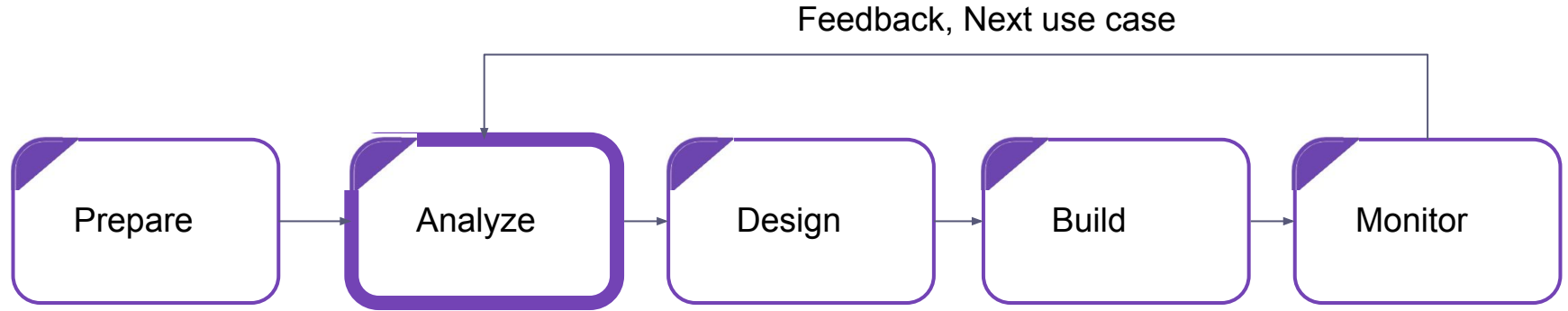
# Implementation methodology



# Implementation methodology



# Implementation methodology



Use case  
Requirement  
ERD  
Context DFD  
Metadata dictionaries  
Data analysis/clean up



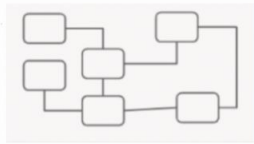
# Planning documentation

ANALYSIS

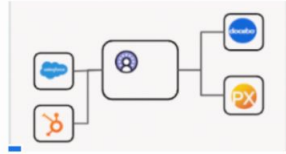
Requirements



Use Case ERD



Context DFD



Metadata dictionaries

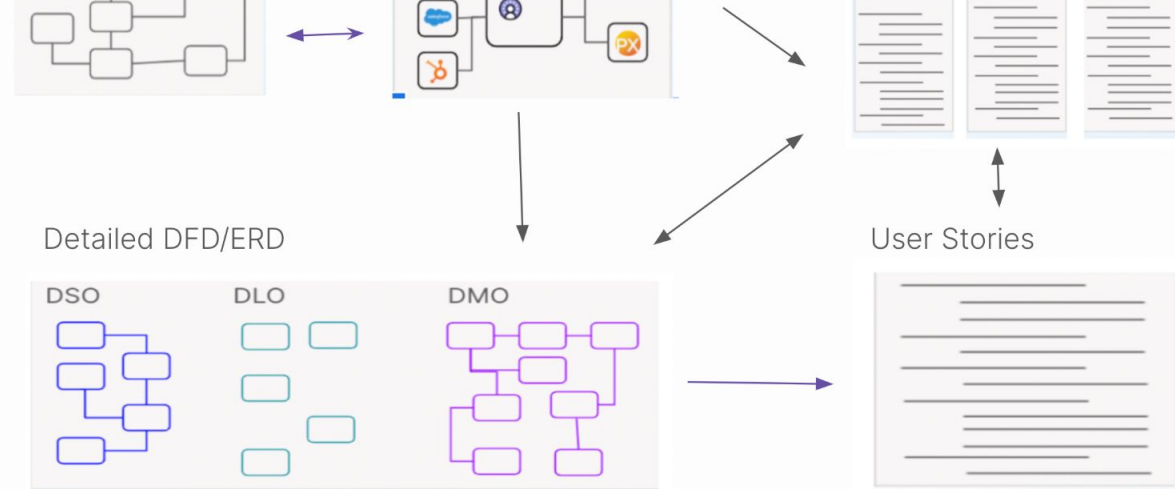


DESIGN

Detailed DFD/ERD



User Stories

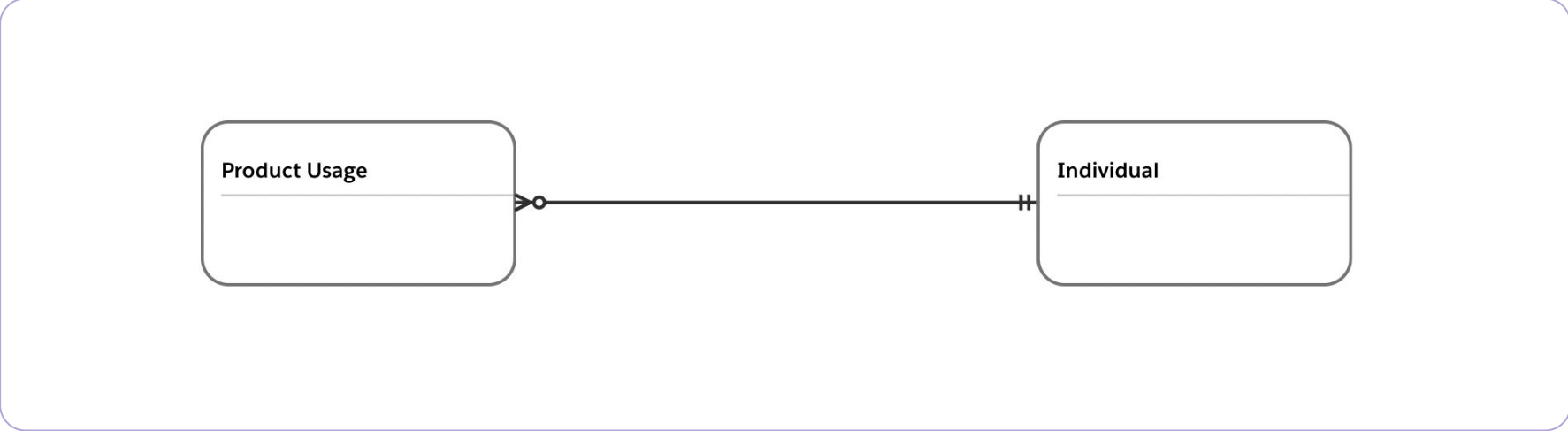


# Requirements: Our internal use cases

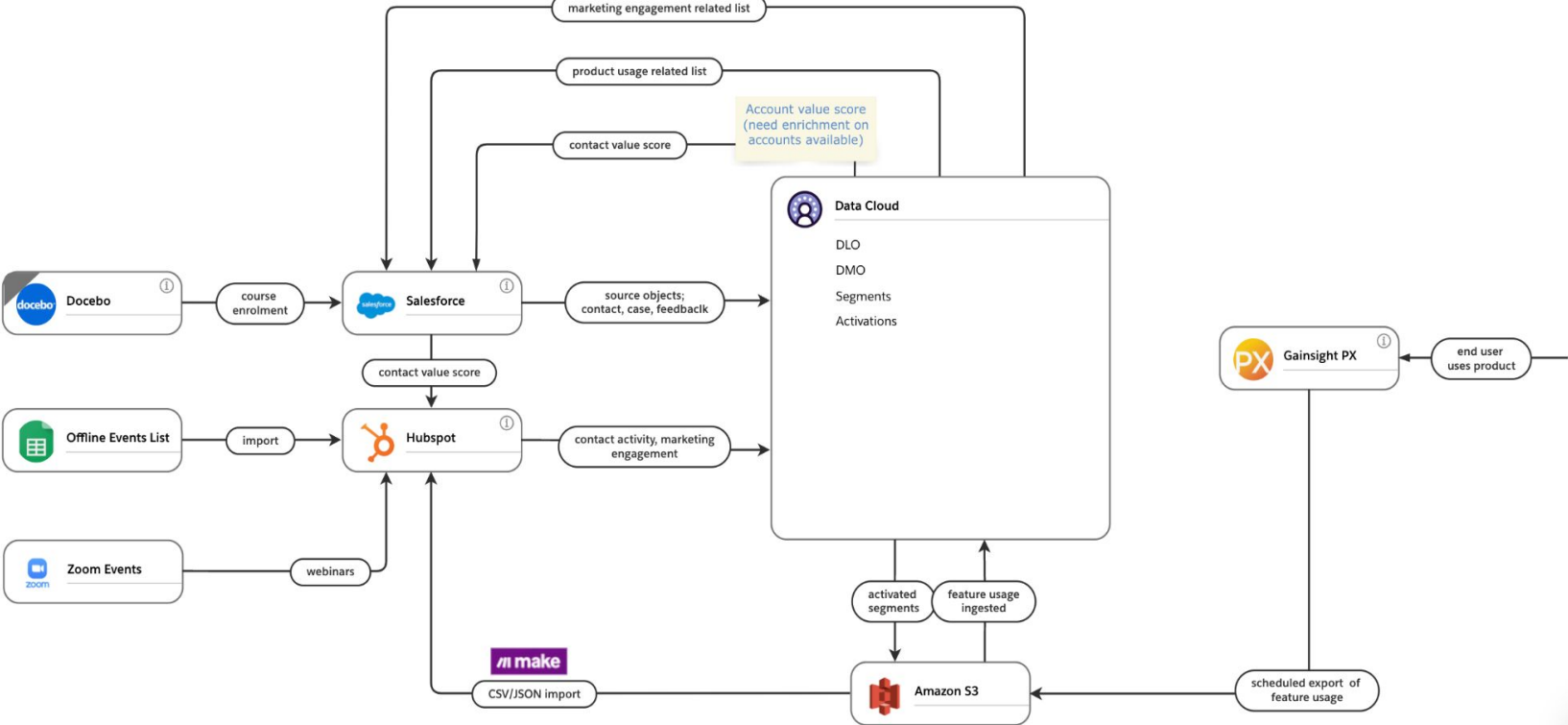
1. Engage contacts who have been on a product webinar and have:
  - a. Used that feature in Elements in the next 15 days.
  - b. Not used that feature in the next 15 days.
2. Calculate an engagement score for a contact and make it visible in SF
3. **Display detailed product usage data directly in the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



# Use Case ERD: each use case (Entity Relationship Diagram)



# Context DFD (Data Flow Diagram)



# Metadata dictionaries

App | Select your view | All types and Search by label or api | Analytics 360

Data: Salesforce config | Last synced on: June 24, 2024 at 22:01

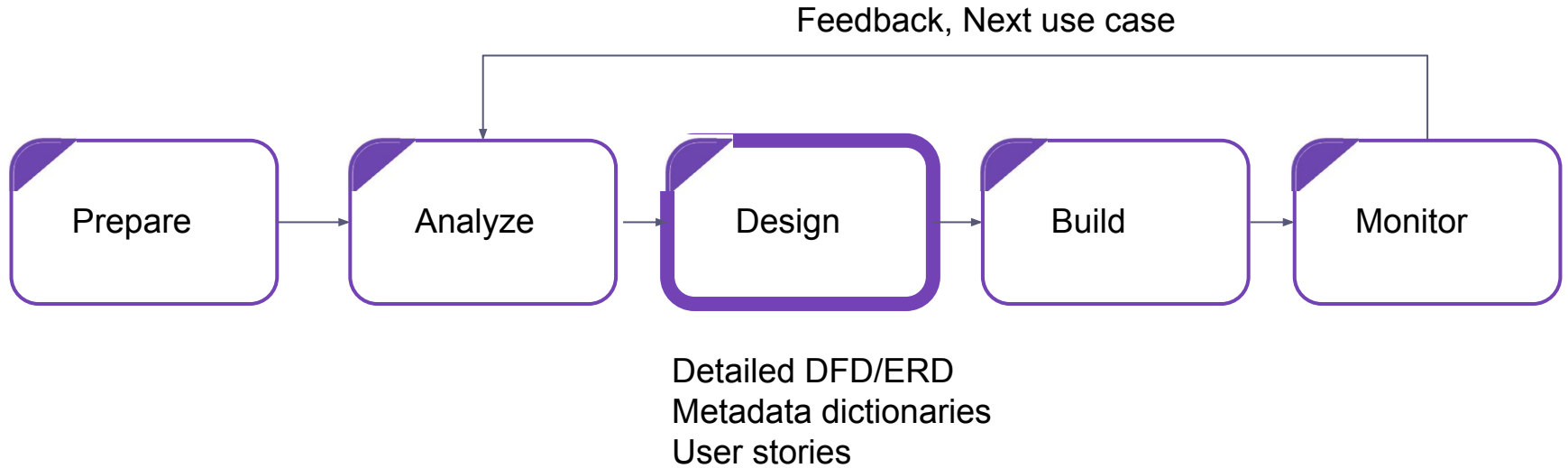
Name	Status	# of links	Data privacy
▼ Standard Objects		0	
▼ Account		51	
Approval Processes		0	
▶ Buttons, Links, and Actions		2	
▶ Compact Layouts		0	
▶ Duplicate Rules		0	
Email Alerts		0	
Field Sets		0	

number of Spac...  
Owner ID  
Photo URL  
Record Type ID  
Website  
Usage period  
Billing Counr...  
Employees  
Annual Revenue  
Industry

Metadata Type	Number of Links
number of Spac...	100
Owner ID	100
Photo URL	100
Record Type ID	100
Website	100
Usage period	95
Billing Counr...	90
Employees	85
Annual Revenue	80
Industry	75

USED BY:  
Apex Classes (6)  
Apex Pages (7)

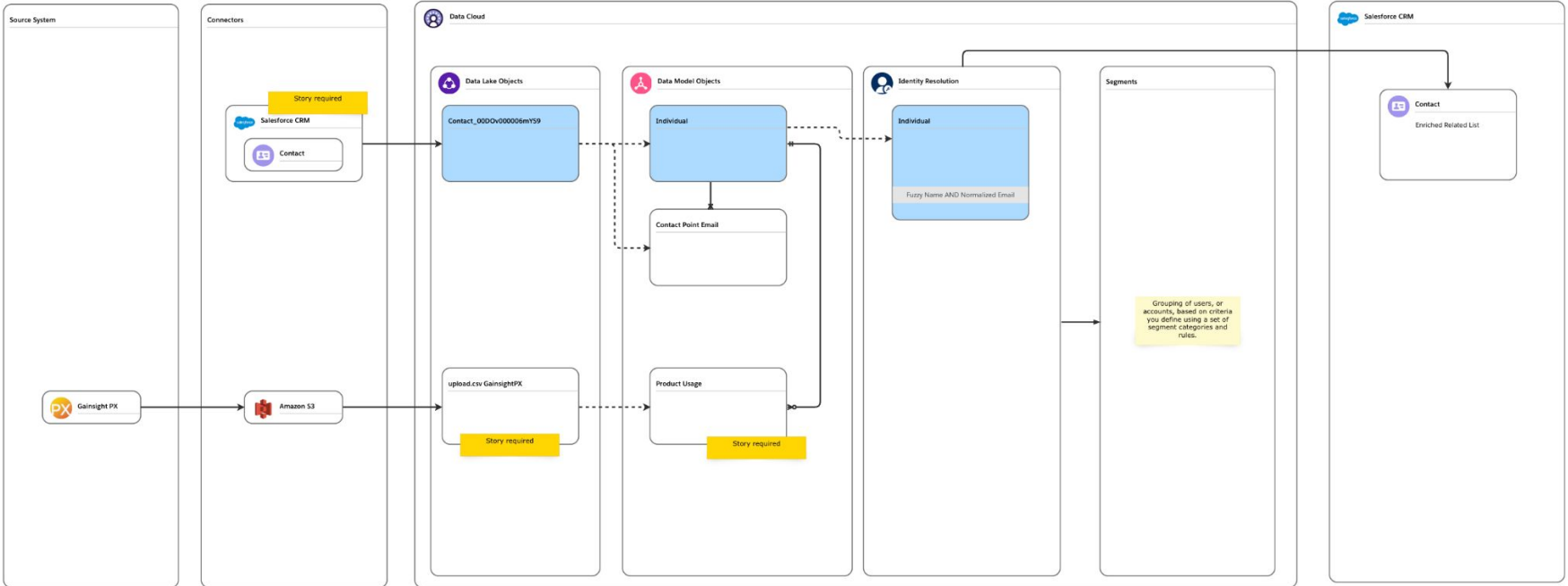
# Implementation methodology



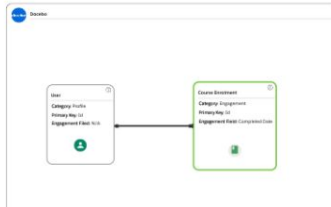
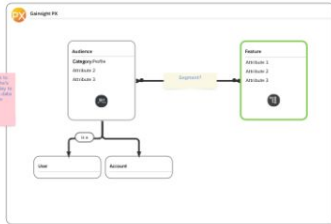
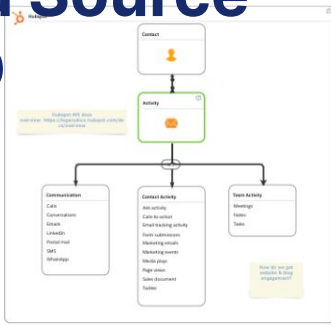
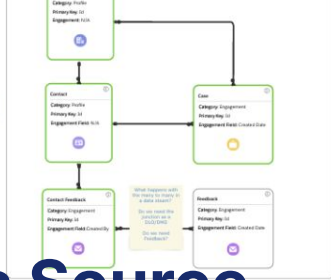
# Detailed DFD/ERD: each use case

## DFD - Product Usage

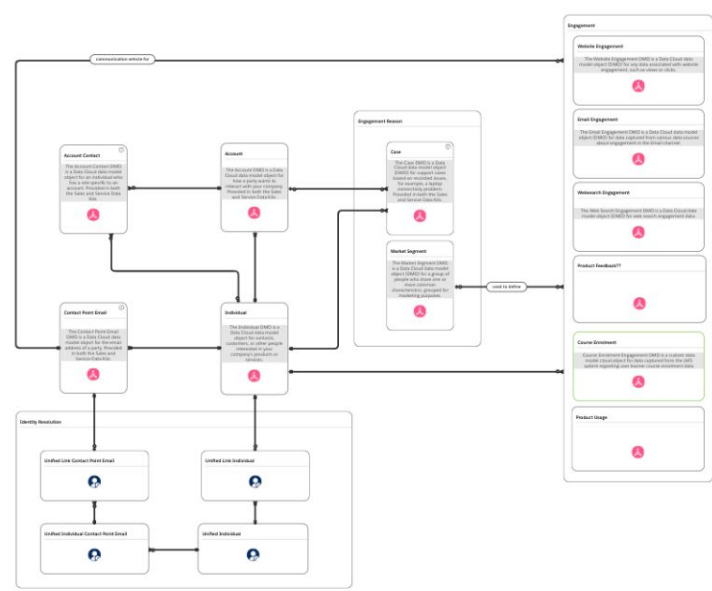
Data flow diagram for the product usage data cloud use case



# Data Source DSO



# Data Lake DLO



# Data Model DMO



# User Stories: 1st use case

🏠 Home

📁 Elements Operations ?

Change space ▾
⚙️
📄 2
🔔 8
📧 1
🌐
?

REQUIREMENTS
STORIES
FEEDBACK

Grid views  
All ▾

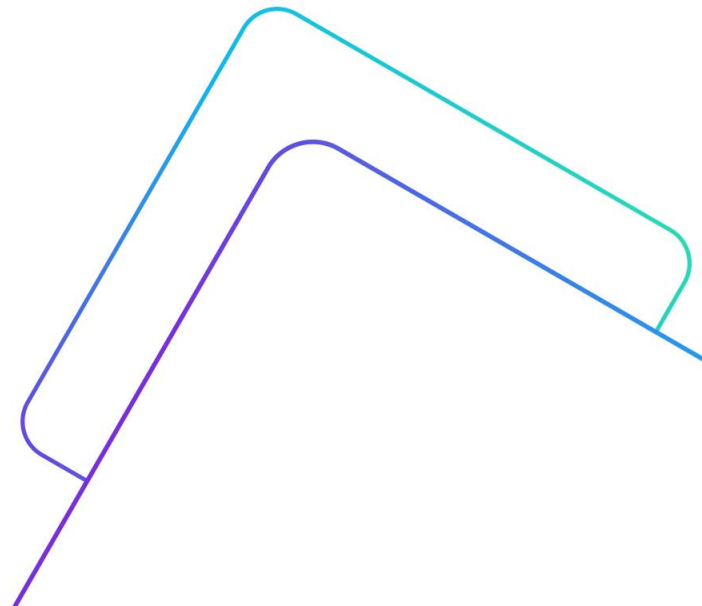
ADD NEW
RESET FILTERS
IMPORT
↻

<input type="checkbox"/>	Summary				Description	Affected roles	Acceptance Criteria	Status	Risk	Conflict
<input type="checkbox"/>	Entitlement Field to appear in the choices of fields for	3040			Field to appear in the choices of fields to display in My Pipeline so that the		Product entitlement field should display the correct data for each record in My Pipeline view. User	Ready for ...	Low	
<input type="checkbox"/>	modify an access to opportunities and accounts for transferring record	3039			want our vps or regions to have modify all access to both opportunities and accounts so that they can transfer	er	other users within the system without restrictions.Audit Trail:The	Shipped	Low	
<input type="checkbox"/>	other user page layout and renaming the system	3038			rename the system admin layout to Space Layout so that the space object	Sales Team	users.FIELD ACCESSAll necessary fields remain accessible to both custom administrators and other	In design	Low	
<input type="checkbox"/>	analysts to override trial priority points for sync error cases to adjust queue	3037			automatically assigned trial priority points given to a sync error case, so that low priority trial sync error cases	Customer Support Analyst	Update:The case queue must dynamically update to reflect the	Being defi...	Medium	
<input type="checkbox"/>	sync error cases with a trial license space to prioritize in	3036			with a trial license space and assigns them 99 priority points, so these cases	Customer Support Analyst	number left of DP.Queue Placement:Cases with 99 priority	Being defi...	Medium	
<input type="checkbox"/>	Classic email template to support all types of time off	3035			accommodate various types of time off so that I can easily submit requests for and receive its required news, so that I		(e.g., radio buttons or checkboxes) to select the type of time off being requested. Automatic	Shipped	Low	
<input type="checkbox"/>	Create custom DMO for Product Usage in Salesforce	3034			can take the data ingested into the Campaign BY DMO and use it within the	Data Cloud Admin	Cloud.Validation:The "Product Usage" DMO correctly stores and customers: if the invoice is billed	Ready for ...	Medium	
<input type="checkbox"/>	Data Cloud integration to apply appropriate tax rates based on the billing company and	3033			Tax field to ensure that the correct tax rate is applied based on whether the		from Ltd to a customer outside the United Kingdom, the integration for tax calculation are functioning correctly without reliance on the UK VAT Required field. User	Shipped	Low	Open
<input type="checkbox"/>	VAT Required field from the opportunity form as it is no	3032			the opportunity form because the tax calculation is now handled by			Shipped	Low	Open
<input type="checkbox"/>	from Salesforce and transfer existing data to the	3031			transfer their existing values to the description field, ensuring that	Sales Manager	the data from the MEDDICC fields is clearly marked and identifiable	Shipped	Low	Resolved
<input type="checkbox"/>	and default discount on pricebook, product, and	3030			discount from pricebook, product, and opportunity product pages, so that the		DISCOUNT PROCESS. The system should support a manual discount entry of 50% without any percent change in the system log and	Shipped	Low	
<input type="checkbox"/>	Delete unused fields on the feedback object	3029	MH		any integrations, not on any page layouts, and have not been filled out		update any relevant documentation. Notify relevant customer user needs to be able to track the status of the sent	Shipped	Low	
<input type="checkbox"/>	Send Invoice for Sales	3028			department, when a sales order is created, I want to send the invoice to	Accounting Department		Being defi...	Unassessed	

# Five key takeaways



- 1. Data Cloud is a step change**
- 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 step change

Spend the time to understand Data Cloud before you start

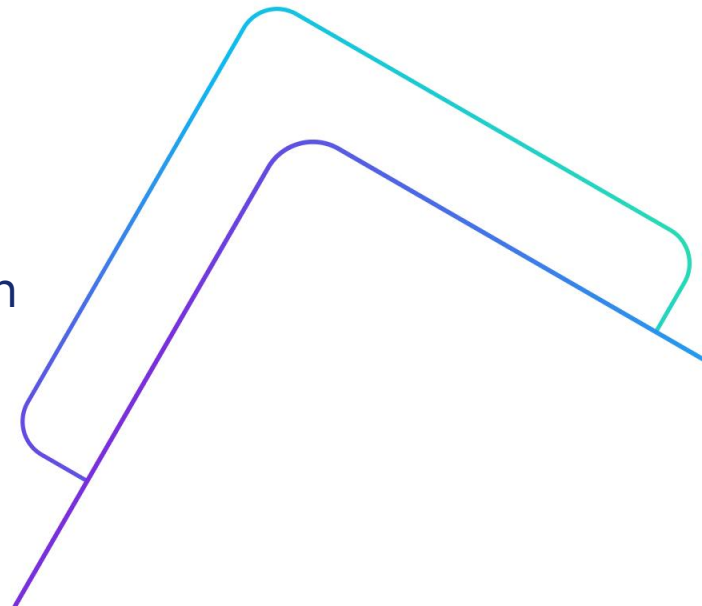
Don't try to learn on your first real implementation

Make sure you really understand each of the concepts

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



**IMPACT**

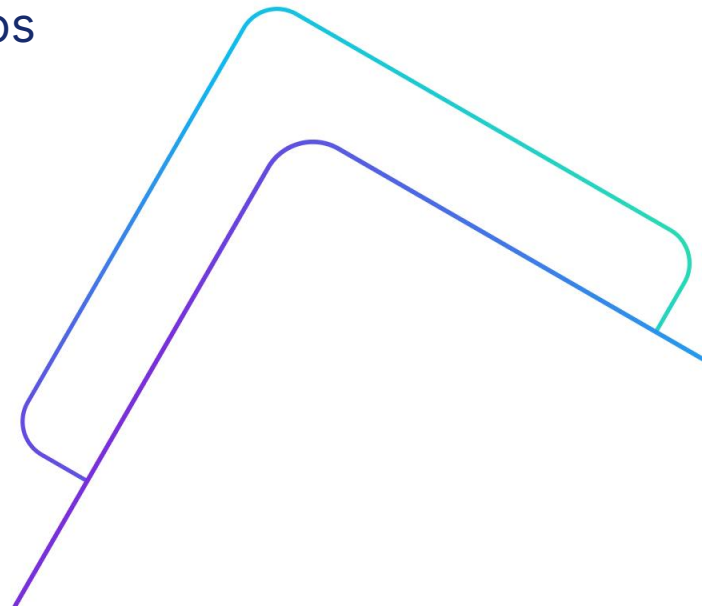


## 2. It's all about the use case

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

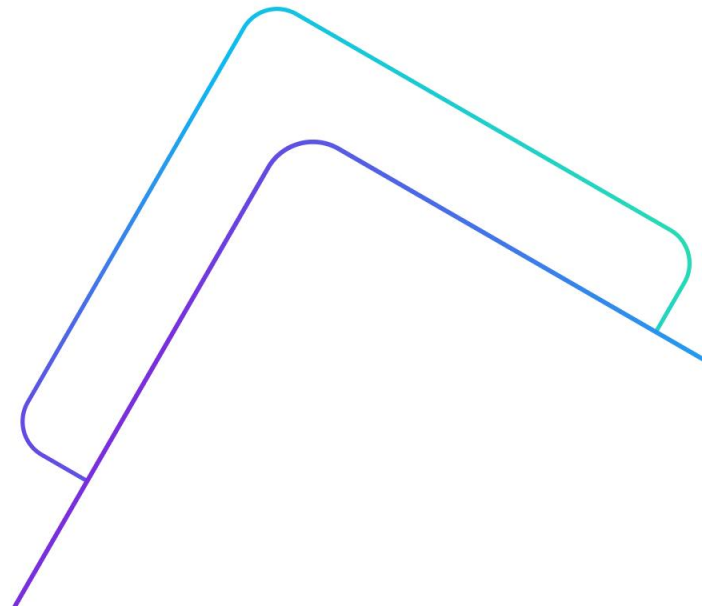
Category	Service	Count
Connect	Data Ingestion	1
	Integration	2
	BYO Data Model	3
Harmonize	Data Model Objects	4
	Profile Unification	3
	Data Lake Objects	5
	Calculated Insights	2
Predict, Analyze & Act	Data Actions	4
	Data Queries	5
	Accelerated Queries	6
	Segmentation	8
	Real-time Profile API	7

\* 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

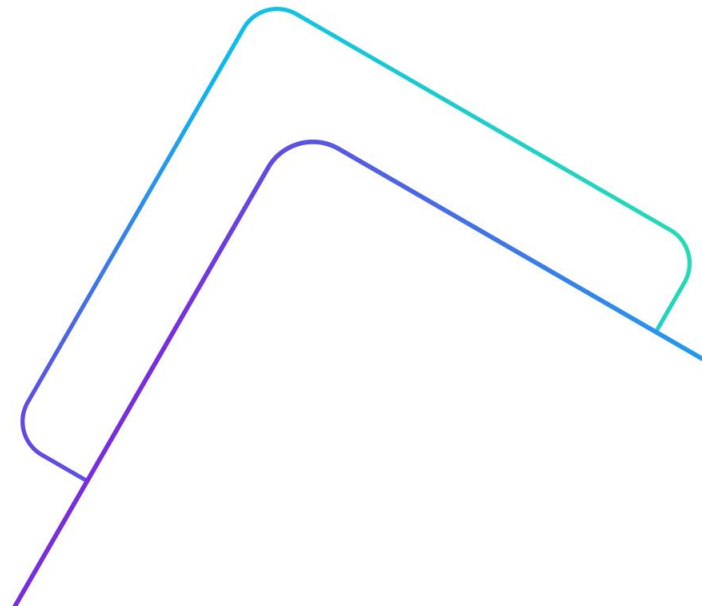


## 5. Data Cloud is the future

Data cloud is not a small add-on

It is the future of the Salesforce platform

Everybody needs to understand the value





# Panel Session



**Richard Parker**

Founder, CCO



**Elements**.cloud  
THE CHANGE INTELLIGENCE PLATFORM



/richardparkergeneva



# Panelists



**Sam Wadhvani**

Chief Technical Architect



**Stephan Chandler-Garcia**

Director of Strategic Content



**Richard Clark**

VP EMEA Alliances & Success

