



Unlock Better Customer Experiences with Persistent and Salesforce Data Cloud



Introduction

Customers will quickly switch brands after an unpleasant experience, so having a unified view of every customer and each customer interaction is essential. With Salesforce Data Cloud and by collaborating with Persistent, you can create better, more personalized customer experiences that ensure brand loyalty and repeat customers. At Persistent, we've seen how Data Cloud has helped our clients create great customer moments and want to share several ways to unlock better customer experiences with a complimentary discovery workshop that delves into industry-specific use cases.

How can Data Cloud help?

Whether it's external data from your website, mobile app, and end products, or internal data from your Salesforce orgs and clouds like sales or service, Data Cloud can connect and harmonize all this data on the Salesforce platform to:

- Reduce costs with Einstein's AI-powered predictions, recommendations, and insights that use real-time unified profile data to personalize every customer experience.
- Increase productivity by connecting real-time data with Salesforce Flow to automate any business process and reduce manual tasks.
- Reduce time to market by powering low-code app development.

Data Cloud and Tableau Starter

At Dreamforce 2023, Salesforce announced free Data Cloud and Tableau licenses to all customers that are on Sales and Service Cloud, Enterprise, or Unlimited licenses. This package includes:

- 250,000 Data Services credits; 1 TB of data storage; 1 Data Cloud admin; 100 internal Data Cloud identity users, 1,000 Data Cloud PSL; and 5 integration users. Unlimited Plus Edition customers will get access to 2,500,000 Data Service credits.
- 2 Tableau Creator licenses.

With this new offering, Salesforce has effectively eliminated the barrier to entry for companies looking to explore the power of Data Cloud as well as Salesforce professionals who are eager to expand their skill set and career prospects.

How can Persistent help?

When it comes to implementing innovative technology, integrating systems, or undergoing a digital transformation, it can often be challenging to know where to begin. Fortunately, Persistent is here to help guide you through the process and ensure a successful implementation.

Complimentary Discovery Workshop

Persistent is offering a complimentary discovery workshop for businesses looking to leverage the power of Salesforce's free Data Cloud and Tableau licenses. This workshop presents a unique opportunity for organizations to unlock the true potential of their data, drive informed decision-making across the entire enterprise, and ultimately drive more effective customer experiences.

During this engaging and interactive workshop, our team of experienced consultants will guide you through a comprehensive process:

Define and Prioritize Use Cases

Our workshop begins by understanding your unique business challenges and objectives.

Visualize Use Case Insights in Tableau

Data visualization is a crucial aspect of deriving actionable data insights. In this workshop, we leverage Tableau's advanced capabilities to create visually engaging and interactive dashboards that bring your use cases to life.

Plan Actionable Use Cases across Your Business

Once use cases are defined and the insights visualized, we shift our focus to planning how to action and operationalize these use cases across your organization.

Design Solution Architecture

We collaborate with your team to develop a scalable and robust architecture that supports your long-term data integration and visualization needs.

Create a Proof-of-Concept

Once use cases and data sources are defined, our team works diligently to create a proof-of-concept to demonstrate how the integration of Salesforce's Data Cloud and Tableau can address your specific business challenges.

Identify Data Sources

Next, we collaborate with you to identify relevant data sources that can be seamlessly integrated with Salesforce.

Don't miss out on this incredible opportunity to explore the capabilities of Salesforce's Data Cloud and Tableau! Contact our team today to schedule your complimentary discovery workshop and embark on a journey toward data-driven success.

[Schedule Workshop](#)



Industry-Focused Use Cases

The **Banking, Financial Services, and Insurance** (BFSI) industry is constantly evolving and adapting to technological advancements, including leveraging the power of Data Cloud. By leveraging Data Cloud in a variety of use cases, BFSI companies gain valuable insights that can drive business growth and improve customer experiences.

Investment Management

By analyzing customer financial data and market trends, BFSI companies can offer personalized investment advice and portfolio management services. Algorithms can identify patterns and trends in the market, helping investment managers make informed decisions. Additionally, by analyzing customer financial data, investment managers can provide tailored investment recommendations based on individual risk profiles and financial goals.

Risk Management

For BFSI companies, managing risk is a strategic and regulatory imperative. Companies can aggregate and analyze customer data to assess credit risk and detect fraudulent activities. By leveraging advanced analytics techniques, such as machine learning and AI, companies can identify potential risks and take proactive measures to mitigate them. This enhances overall security and reduces the likelihood of financial losses due to fraud or credit defaults.

Product Development

Data Cloud can also inform the development of new BFSI products and services. By analyzing customer insights and market demand, BFSI companies can identify market gaps and opportunities. This helps them design and develop new financial products and services that are tailored to meet immediate customer needs. By aligning their offerings with market demand, companies can gain a competitive edge and drive business growth.

Churn Prediction

By analyzing historical data and real-time interactions for patterns and trends, Data Cloud can predict customer churn and establish retention strategies. For example, they can offer personalized incentives or tailored solutions to address specific needs and concerns of at-risk customers, helping to reduce churn rates.

Customer Segmentation

Segmenting customers based on behavior, preferences, and financial history is critical for BFSI companies to serve consumers effectively. By leveraging Data Cloud, companies can divide their customer base into distinct segments, and then provide customized services and offerings to each, based on their unique needs and preferences. For example, customers who prefer digital-only banking solutions can be provided with specialized and personalized online banking experiences, while customers who prefer in-person interactions can receive tailored services at physical branches.

Cross-Selling and Upselling

Data Cloud helps BFSI companies identify opportunities for cross-selling and upselling financial products and services. By analyzing customer interactions and behaviors, companies can gain a holistic view of each customer's individual needs and preferences. This enables them to identify relevant products or services that complement the customer's existing portfolio, increasing customer engagement and driving additional revenue.

Customer Service Optimization

When it comes to consumers and their finances, providing high-quality customer service is absolutely essential. By providing agents with real-time access to comprehensive customer profiles through Data Cloud, agents can quickly retrieve customer information, understand their preferences, and provide personalized assistance. This not only improves customer satisfaction but also reduces the time and effort required to resolve customer queries or issues.



The **Healthcare and Life Sciences** (HCLS) industry is undergoing rapid change via digital transformation, with Data Cloud playing a crucial role in improving patient outcomes, optimizing healthcare operations, and enhancing overall efficiency.

Patient Outcome Analysis and Personalized Care

Data Cloud lets healthcare providers analyze data from patient encounters, follow-ups, and treatment progress. By leveraging data from CRM systems and multiple clinical systems, providers can identify patterns and risks that impact patient outcomes. This enables them to provide personalized care plans that address individual patient needs and improve overall treatment effectiveness.

Population Health

Data Cloud can aggregate and analyze data from multiple sources, such as electronic health records (EHRs), wearable devices, and public health databases, to identify patterns and risks related to population health. By analyzing this data, they can take preventive actions, implement targeted interventions, and address public health concerns proactively.

Provider Network Optimization

By aggregating data from multiple providers and their databases, healthcare organizations can analyze the quality of care and look for ways to optimize internal workflows and improve patient experiences.

Fraud Detection and Prevention

By continuously monitoring data related to claims, settlements, benefits, and prior authorizations, healthcare organizations can guard against fraud by identifying patterns and performing analyses to detect unusual activity. This enables them to prevent financial losses and ensure the integrity of their systems.

Solving Complex Supply Chain CGT / Rx Order

Data Cloud can deliver benefits to the complex supply chain involved in Cellular and Gene Therapy (CGT) and Prescription (Rx) Order Management. Healthcare organizations can create a unified data model across multiple supply chain players to provide greater degrees of visibility, tracking and optimization. This generates improved efficiency and better patient outcomes.

Secure and Connected Data Ecosystem for Pharma

Data Cloud helps pharmaceutical companies improve their relationships with healthcare professionals (HCPs) and deliver targeted and personalized content experiences. By connecting online and offline touchpoints and ingesting data in real-time, pharmaceutical companies can activate messages across various channels, providing HCPs with relevant information about new drugs or medical devices, which enhances overall engagement and improves sales and marketing efforts. In addition to our industry-specific use cases in BFSI and HCLS, we offer ongoing support, scalable strategies, and effective risk management that alleviates the burden on your internal resources. Our goal is to ensure that your team derives maximum value from our collaboration.

Client

Success Stories



Breaking Down Data Silos and Transforming Digital Marketing



The Challenge

A leading German-based mortgage financing brokerage services lender was struggling with disparate customer data, resulting in longer buying cycles that were impacting their ability to scale and automate their marketing efforts.

The Solution

Persistent stepped in and implemented a central data platform for a 360-degree view of each customer. Salesforce Marketing Cloud also allowed the business to execute omnichannel marketing journeys based on customer data such as loan value, loan type, interest rates, and interactions over a 24-month period. This data allowed for hyper-customized communications at scale.

The Outcome

By leveraging Salesforce Sales Cloud, Marketing Cloud, and Data Cloud, Persistent broke down data siloes and created hyper-personalized, data-driven marketing journeys triggered by a centralized data platform — the kind of journeys that can help power growth and profitability.

Harmonize Enterprise Data and Gain Better Visibility



The Challenge

One of the largest US financial holding companies operating in 7 of the 10 largest US cities was experiencing data warehousing and duplication issues. The company needed to harmonize data to create more focused campaigns and further differentiate themselves from their competition.

The Solution

Persistent implemented a 360-degree customer view, leveraged surveys to identify cross selling opportunities, and developed customer retention journeys for at-risk customers.

The Outcome

By implementing this Customer 360 solution, Persistent increased cross-channel customer journeys by 10 times over six months, resulting in a higher Net Promoter Score (NPS), greater conversion rates and higher customer retention. In addition to raising customer satisfaction, online account opening increased along with lifetime customer value.

Tap into the Power of Your Data

As we've witnessed through our collaboration with clients around the world, mapping your data into a user-friendly Data Cloud model offers numerous benefits for data management and analysis. From fast data ingestion to personalized marketing and in-depth insights, a user-friendly data model is a powerful tool for businesses in today's data-driven world — and you can harness the collective expertise of Salesforce and Persistent to enable these benefits and more for your company.

Ready to take your customer experience to the next level?

[Contact Us](#)

About Persistent

With over 23,000 employees located in 21 countries, Persistent Systems (BSE & NSE: PERSISTENT) is a global services and solutions company delivering Digital Engineering and Enterprise Modernization. We work with the industry leaders including 14 of the 30 most innovative companies as identified by BCG, 8 of the top 10 largest banks in the US and India, and numerous innovators across the healthcare and software ecosystems. As a participant of the United Nations Global Compact, Persistent is committed to aligning strategies and operations with universal principles on human rights, labour, environment, and anti-corruption, as well as take actions that advance societal goals.

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