

salesforce

# Deliver the next generation of new build sales experience for buyers and sellers

Salesforce

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# Forward-Looking Statement



## Statement under the Private Securities Litigation Reform Act of 1995

This presentation may contain forward-looking statements that involve risks, uncertainties, and assumptions. If any such uncertainties materialize or if any of the assumptions proves incorrect, the results of salesforce.com, inc. could differ materially from the results expressed or implied by the forward-looking statements we make. All statements other than statements of historical fact could be deemed forward-looking, including any projections of product or service availability, subscriber growth, earnings, revenues, or other financial items and any statements regarding strategies or plans of management for future operations, statements of belief, any statements concerning new, planned, or upgraded services or technology developments and customer contracts or use of our services.

The risks and uncertainties referred to above include – but are not limited to – risks associated with developing and delivering new functionality for our service, new products and services, our new business model, our past operating losses, possible fluctuations in our operating results and rate of growth, interruptions or delays in our Web hosting, breach of our security measures, the outcome of any litigation, risks associated with completed and any possible mergers and acquisitions, the immature market in which we operate, our relatively limited operating history, our ability to expand, retain, and motivate our employees and manage our growth, new releases of our service and successful customer deployment, our limited history reselling non-salesforce.com products, and utilisation and selling to larger enterprise customers. Further information on potential factors that could affect the financial results of salesforce.com, inc. is included in our annual report on Form 10-K for the most recent fiscal year and in our quarterly report on Form 10-Q for the most recent fiscal quarter. These documents and others containing important disclosures are available on the SEC Filings section of the Investor Information section of our Web site.

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# Salesforce.org: Our Path to Impact

To Improve the State of the World

salesforce



TECHNOLOGY

for Social Change

89%

Of customers say Salesforce.org helps them achieve their mission



INVESTMENT

In the EMEA Region through Grants

\$3.8m in 2018

+150% YOY growth on 2017 Investments



COMMUNITY

of Citizen Philanthropists

3M+

Volunteer hours



IMPACT



Connect to Better



# Vision for a Connected Housing Association





## WHAT IT IS NOT

salesforce

Salesforce is not a Housing Management System  
Salesforce is not a Housing Management System  
Salesforce is not a Housing Management System  
Salesforce is not a Housing Management System  
Salesforce is not a Housing Management System  
Salesforce is not a Housing Management Syt





# WHAT IT IS

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Marketing & Social  
Digital Experience  
Customer Engagement  
Rapid Pace  
Robust Integration





# LEADERS & VISIONARIES

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Figure 1. Magic Quadrant for Enterprise Low-Code Application Platforms



Source: Gartner (August 2019)

Figure 1. Magic Quadrant for Sales Force Automation



Source: Gartner (July 2018)

Magic Quadrant

Figure 1. Magic Quadrant for the CRM Customer Engagement Center



© Gartner, Inc



# TRADITIONAL ENGAGEMENT

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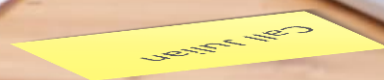
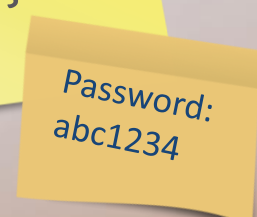
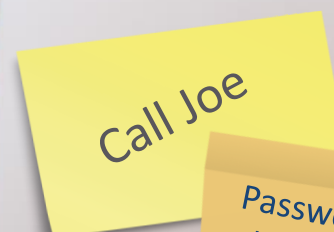




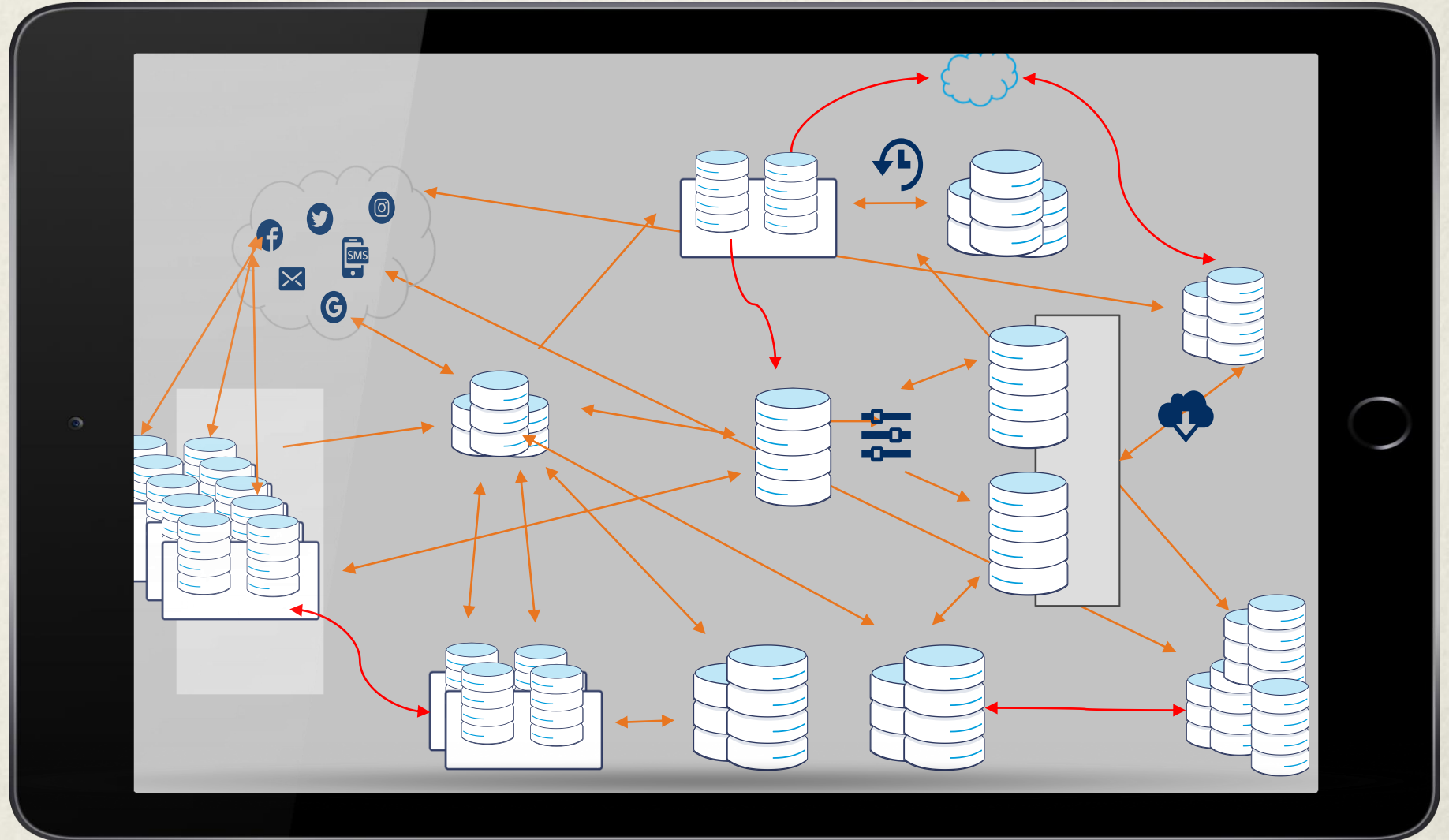
**10**  
**channels**  
average number of  
channels customers use



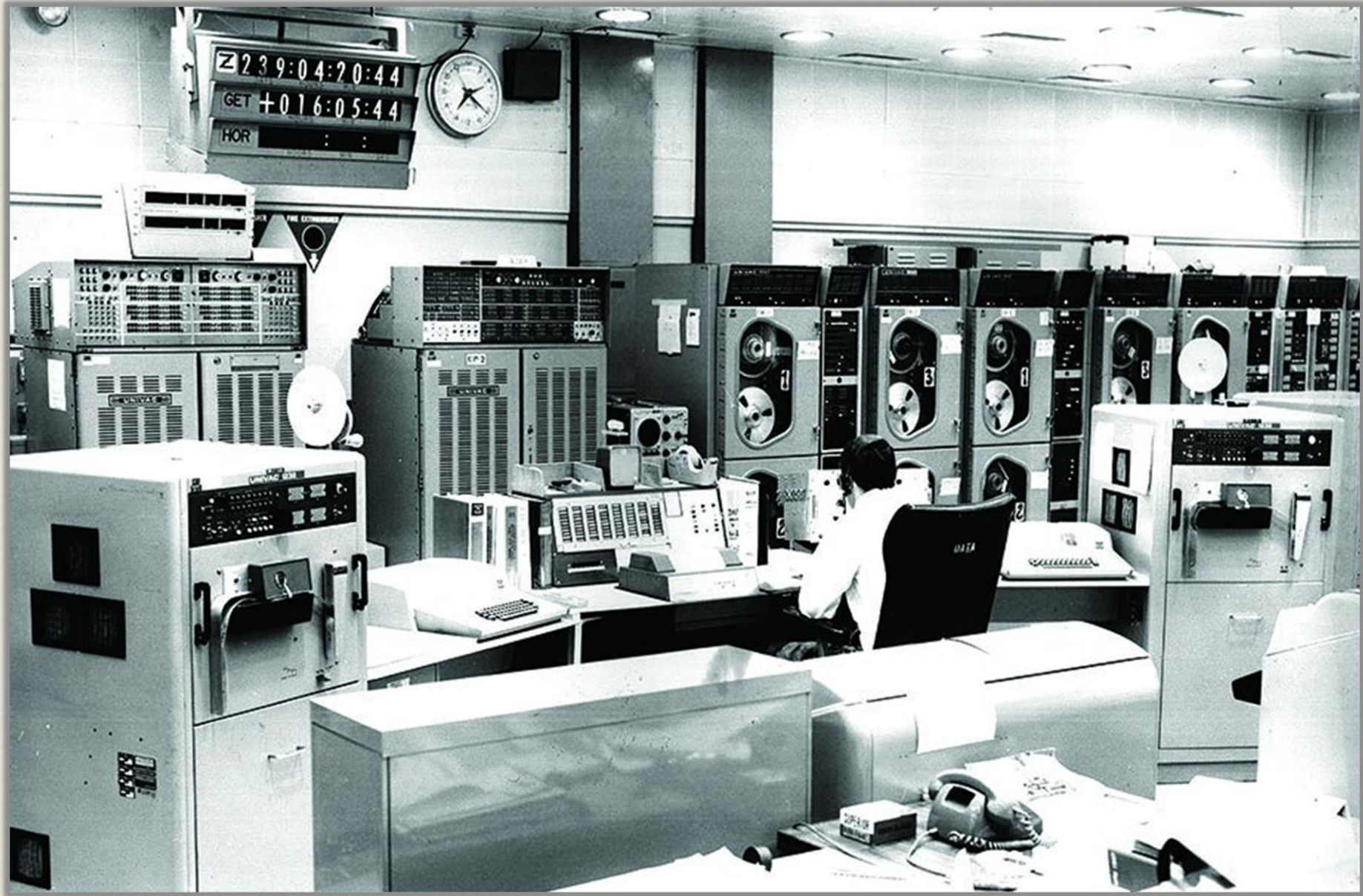








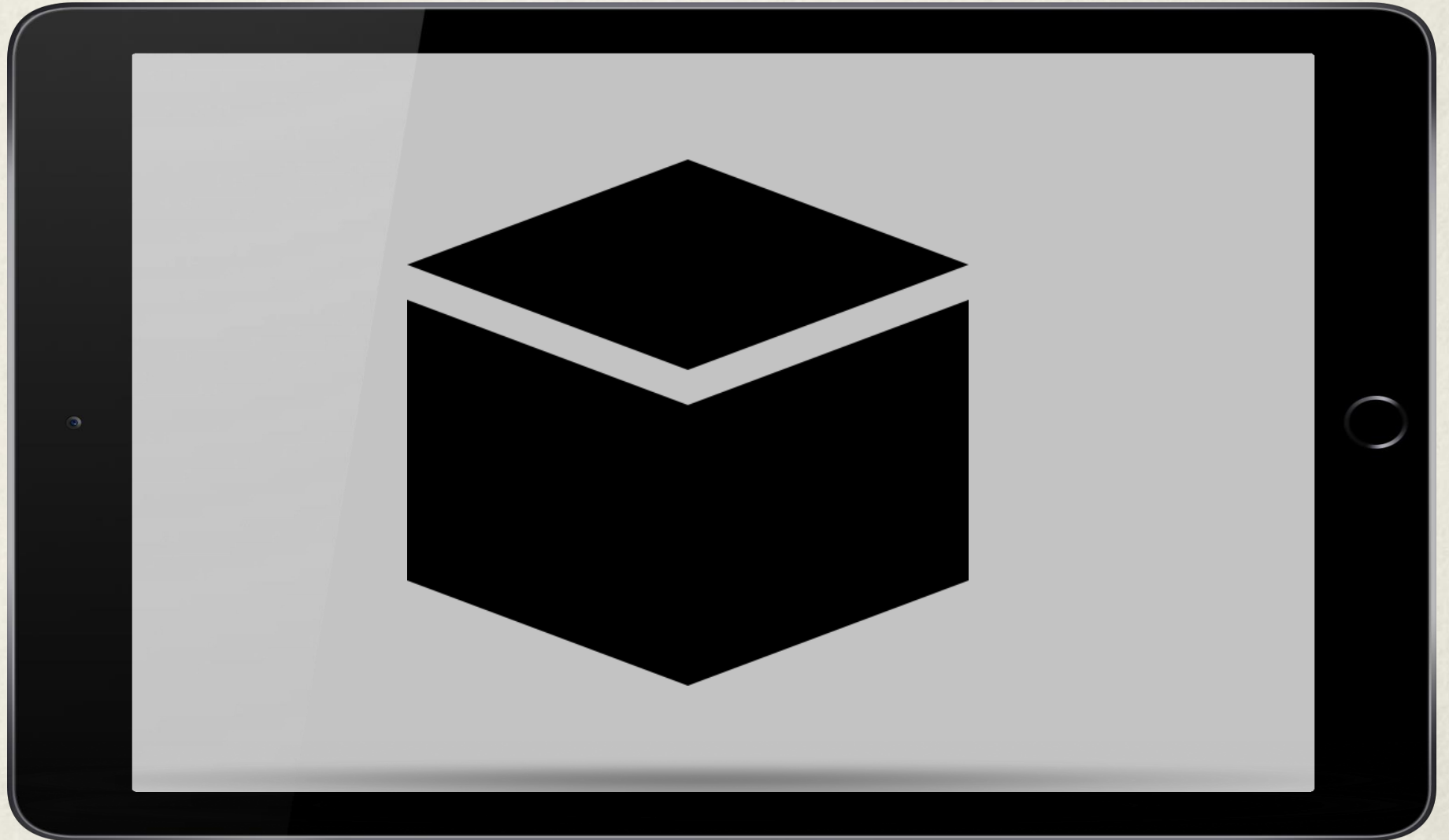






# BLACK BOX

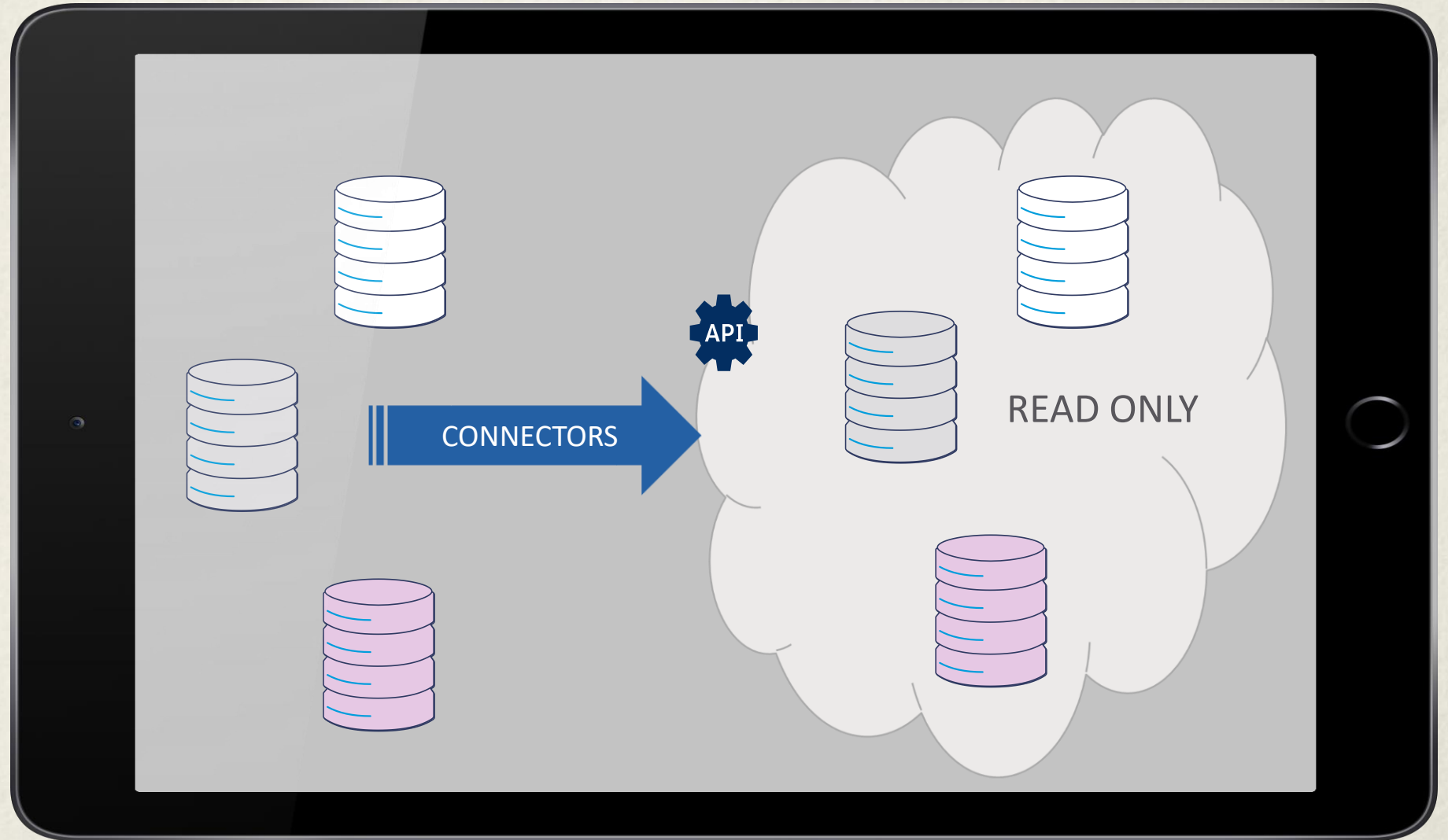
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# DATA STORE

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# SALESFORCE APPROACH

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## Engagement



Multi-Channel Marketing Suite

## Intelligence



AI-Powered Analytics

## NPSP



Nonprofit Data Model & #1 CRM

## Salesforce CRM



#1 Relationship Management Platform



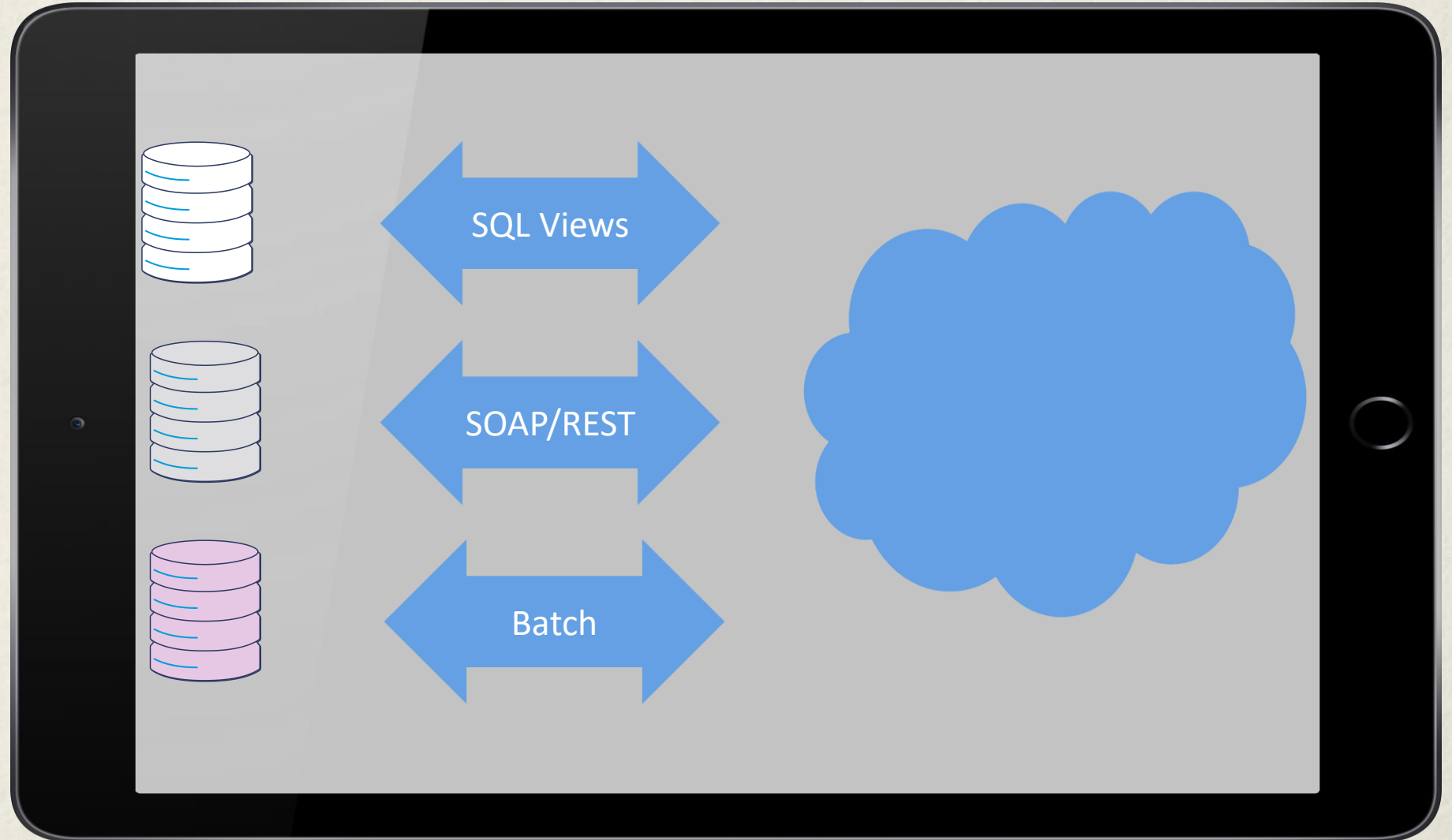
## Salesforce Platform

#1 Enterprise Cloud Platform



# SALESFORCE APPROACH

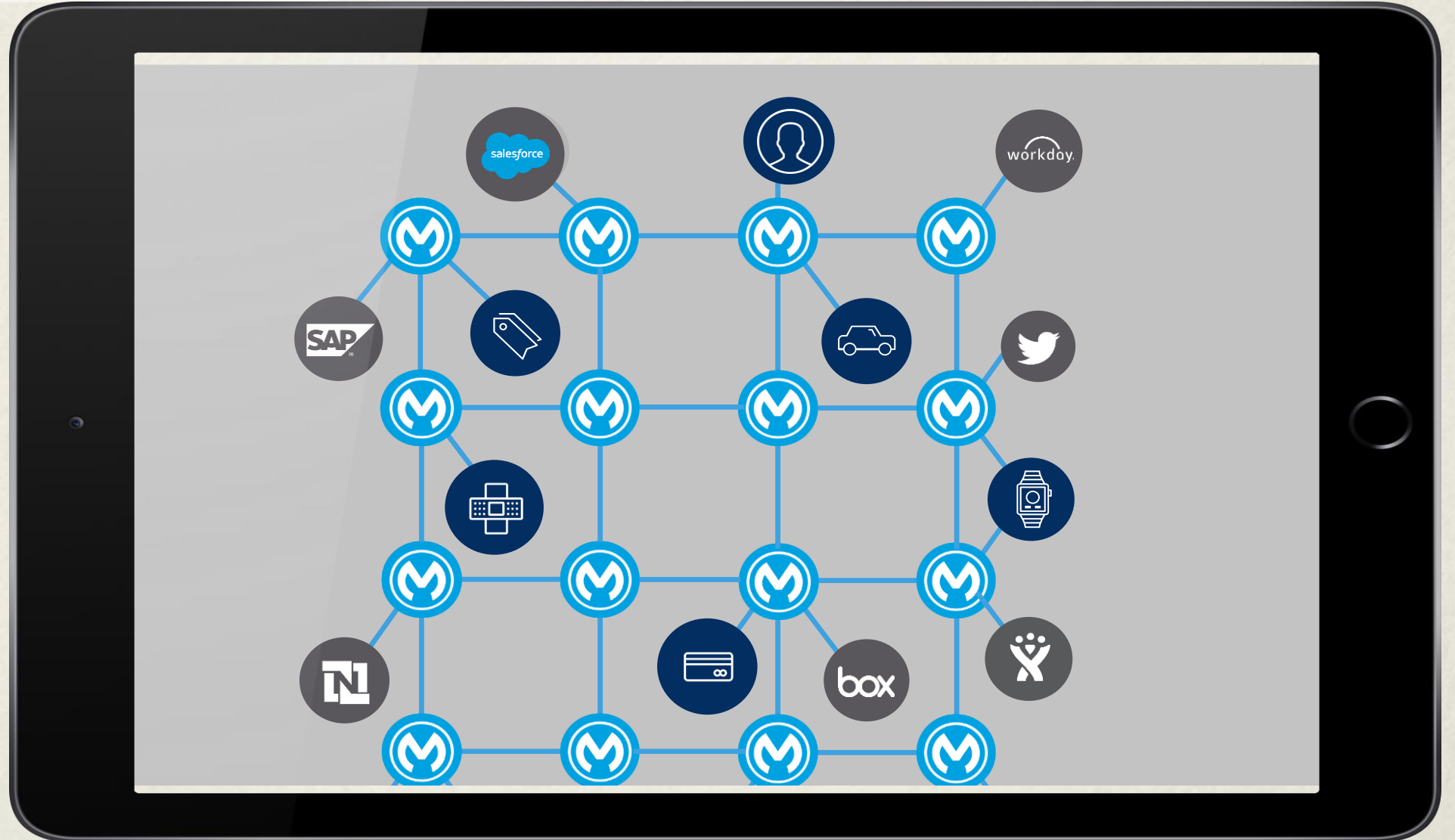
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# SALESFORCE APPROACH

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# Housing Journey



## PROGRAMS & SALES



Programs and Sales



Digital Experience



Community



## AWARENESS IDENTIFY



Web Browsing



Targeted Social



Email



Journey



CRM Record



## ONBOARD ENGAGE



## SERVICE CENTRE



Cases



Social Customer Care



Asset Management



Field Staff



## FIELD TEAMS



Scheduling



Artificial Intelligence



Security



## INFORMATION TECHNOLOGY



Development



## Integration



Reporting



Insights



Analytics



## LEADERSHIP







Say hello to

*Tina*

## **BUYER**

Millennial, Professional

- Excited about buying her first property
- Uses Uber, AirBnB, Prime, Revolut...
- Shops online
- Prefers doing her own research, online
- Prefers self-help and chat over in-person
- Willing to trade personal information



61%

More likely to buy from companies  
delivering custom content

63%

Will switch brands if they receive  
inconsistent experiences

Source: Mastering the digital advantage in transforming customer experience, McKinsey, 2017

Source: "State of the Connected Customer," Salesforce Research, October 2016

Source: Salesforce Customer Success Survey conducted from March 2015 to June 2017. Survey respondents were 7,000+ business executives/project sponsors and system administrators worldwide, randomly selected.





IP Address

Rough Location

Device

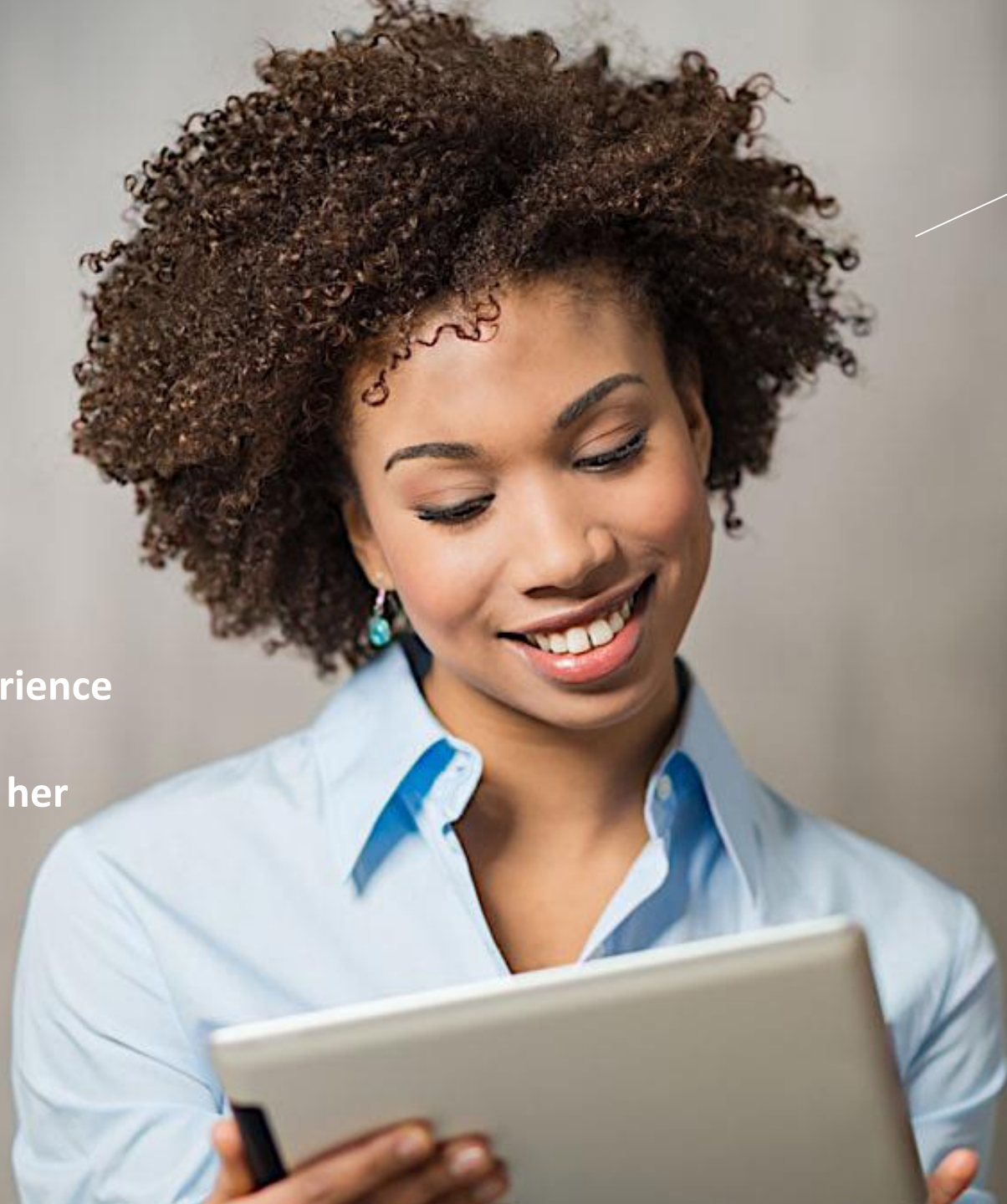
**Move from unknown to known**

**Establish engagement**

**Embark on a journey**

**Profile 360**





**Expects a great digital experience**

**Expects you to know about her**

**Wants personalised service**

**No pushy sales**

IP Address

Location

Device

Social Media Accounts

Area of interest

Finances

Buying Readiness

Address

Phone

Email

....





**Helpful Housing**

Sponsored



Join the in-crowd, become be the first to know about exciting, affordable new builds in your area



**Yes, I want to know!**

Email & postcode



Enter



Like



Comment



Share



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Layers

Routes

POI

Search saved layers...

RecentSavedPlotted

Charlotte Area Architecture and Engineering Firms

Data Layer

Data Points: 345

Architecture, Engineering, and Drafting Firms

541310

157 of 157

541330

123 of 123

--Other--

65 of 65

Show All

Search Salesforce

Home

Search

Layers

POI

Weather

Map

Settings

Hand

Pin

Circle

Square

Refresh in this area

Charlotte Area Architecture and Engineering Firms

Marker: Urban Design Partners

Info

Actions

Company Name:

Urban Design Partners

NAICS01 Description:

Engineering Services

Phone:

7043343303

URL:

urbandesignpartners.com

Location Sales Total:

1,242,474.00

Prefix:

Mr

Full Name:

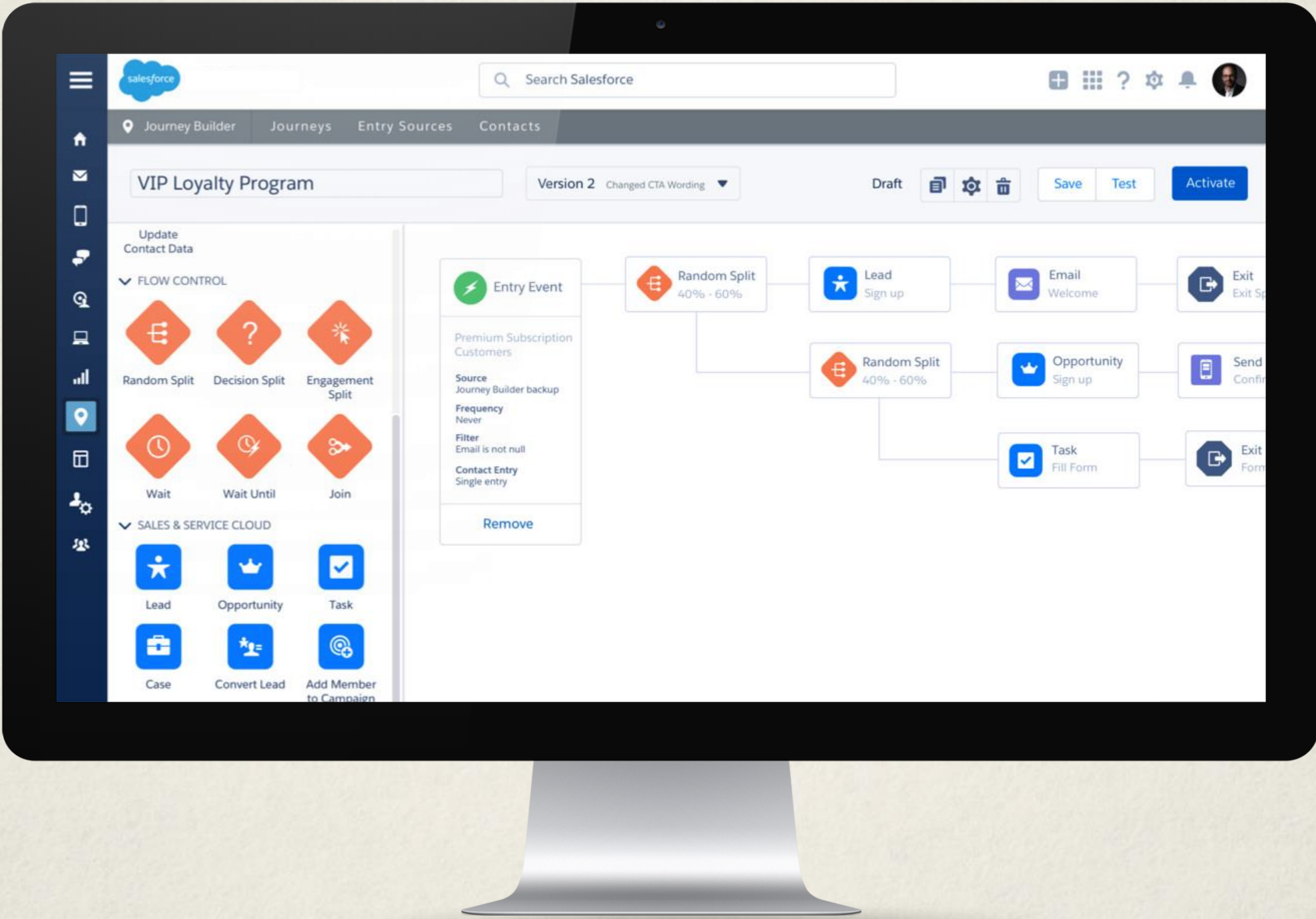
Kent Hoskins

Standardized Title:

Partner

Map





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Search Salesforce



Journey Builder Journeys Entry Sources Contacts

VIP Loyalty Program

Version 2 Changed CTA Wording

Draft



Save

Test

Activate

Update Contact Data

FLOW CONTROL



Random Split



Decision Split



Engagement Split



Wait



Wait Until



Join

SALES & SERVICE CLOUD



Lead



Opportunity



Task



Case



Convert Lead



Add Member to Campaign



Entry Event

Premium Subscription Customers

Source Journey Builder backup

Frequency

Never

Filter

Email is not null

Contact Entry

Single entry

Remove



Random Split

40% - 60%



Lead Sign up



Email Welcome



Exit

Exit Sp



Random Split

40% - 60%



Opportunity Sign up



Send Confirmation

Confir



Task Fill Form



Exit

Form





## Helpful Housing

Hi Tina.

We built an exciting virtual tour for you. Explore as if you were there.

Take me there!



Like

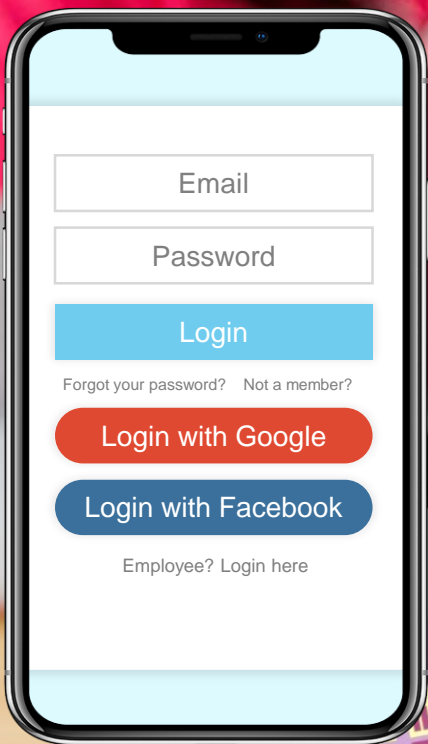


Comment



Share





Email

Password

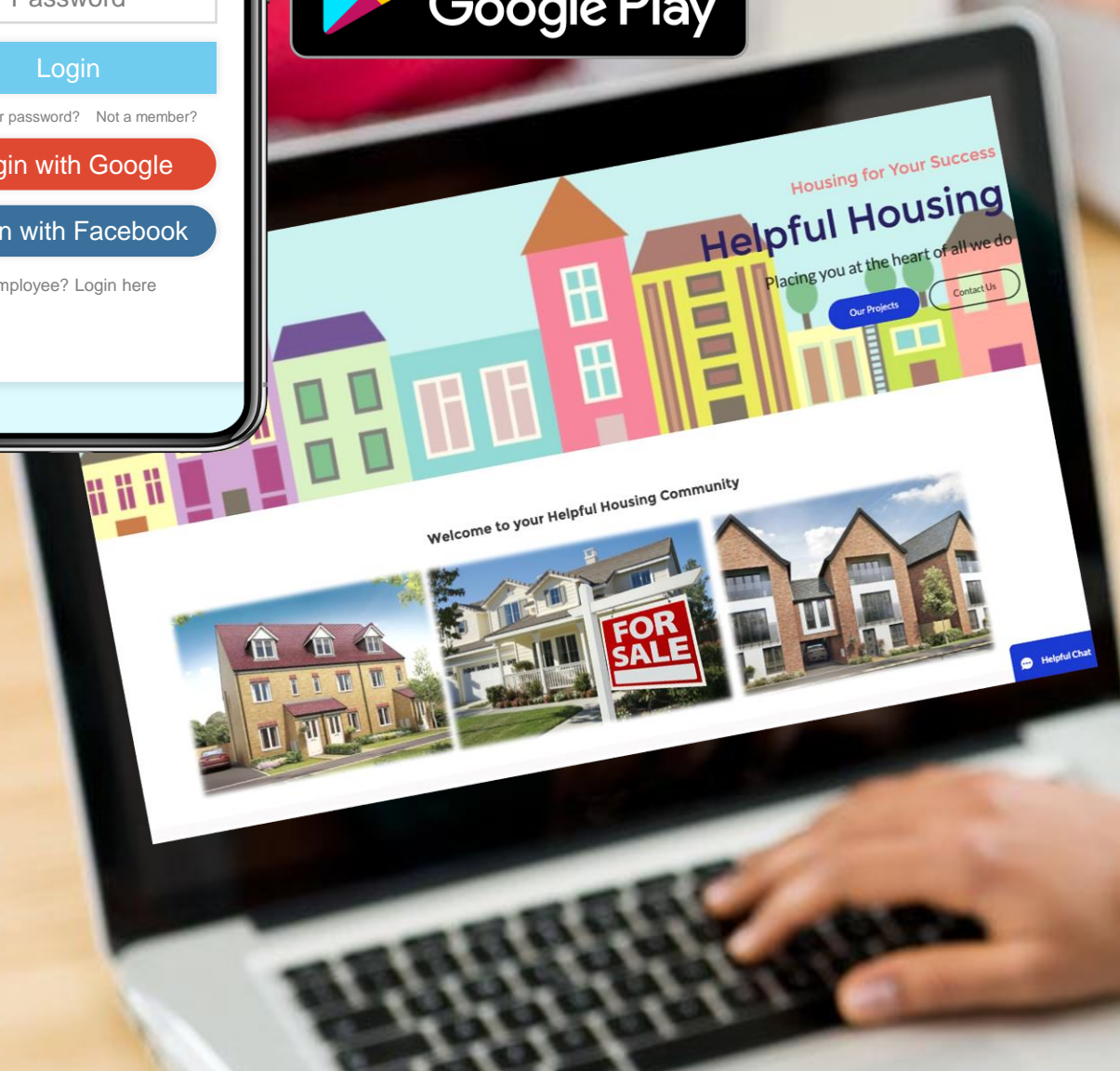
Login

[Forgot your password?](#) [Not a member?](#)

Login with Google

Login with Facebook

[Employee? Login here](#)





## Sales Exec

Boomer, Professional

Say hello to

Sue

- Usually onsite at the marketing suite
- Travels to surrounding sites to sell remaining units
- Has a laptop, mobile and tablet
- Uses O365 for work
- Uses Facebook 'to keep in touch with the kids'
- Profuse user of sticky notes for everything else
- Prefers speaking with people





www.salesforce.com

Search Mail and People

New | Delete | Archive | Junk | Sweep | Move to | Categories | ...

Undo Try the new Outlook

Focused Other Filter

Next: Invitation: Tomorrow at 9:30 AM Agenda

**Volume Pricing Discounts**

To: Gretchen Jadidi <gretchen@assurity.com>

Show message history

Send Discard

Draft saved at 7:55 AM

Gretchen Jadidi <gretchen@assurity.com>

Fri 2/8, 12:45 PM

Laura Liu

Hi Laura,

My business colleague Diane suggested I contact you regarding the Widget X for my department as a potential add on to our current project. I would like to better understand the business value that the Widget X could provide to my team. Can we meet to discuss?

Thank you,

Gretchen Jadidi

Happy to meet with you. We would be happy to meet. I would be happy to meet.

Report inappropriate text

**Salesforce**

Search

Related Tasks Tracking Scheduled

Log Email

**People (2)**

Julian A Miller (5)  
Title: Senior Field Sales Account Exec...  
Account N... SALESFORCE.COM

Mr. CIO  
Title: CIO  
Phone: 02380 684435

**Accounts (2)**

SALESFORCE.COM  
Account Ow... MyPatch Hold  
AOV Band: \$0

Account Ow... Julian A Miller  
AOV Band: \$0

**Opportunities (1)**

Stage: NP - Identifying an Oppty  
Close Date: 17/12/2019  
Opportunity Score: 8

**Cases (20)**

8:30

INBOX

Select Message

Maria Santos, James Smiths...  
RE: Sending the contract!  
Also, forgot to mention in my previous I...  
we need to figure out a way for us t...

Jason Santiago  
Great speaking with you!  
Hi Marc, I am really excited about our p...  
discussions. You guys have some tools t...

James Smith  
Invitation: Quick Demo  
Great! Thank you so much for the quick...  
around. I'm going to discuss this with m...

Julio Gonzalez, Vanessa Shep...  
RE: Sending the contract!  
Great! Thank you so much for the quick...  
around. I'm going to discuss this with m...

Rafael Greens  
Great speaking with you!  
Hi Marc! I have a follow up question th...  
you would be able to answer. Yesterday...

Drew Merryweather

Calendar

Tasks

Contacts

More

MARCH

6 7 8 9 10 11 12

13 14 15 16 17 18 19

Global Conference (DAY 1/3)  
Janine OOO (Day 1/1)  
2 Events

Demo for Shift  
117 UNIVERSITY AVE

8:30AM

9AM

10AM

11AM

Tech Talk: The Architecture of Quip  
117 UNIVERSITY AVE

Hold: Company Wide Meeting  
502 EMERSON ST

Hold Meeting  
117 UNIVERSITY AVE

Hold Meeting  
117 UNIVERSITY AVE

Getting Better...

Lewis Dentist  
appt  
DR. ROMERO  
PRACTICE

Calendar

Tasks

Contacts

More



The screenshot displays a web browser window with two main applications: an email client (Outlook) and a calendar application (Salesforce).

**Email Client (Outlook):**

- Search Bar:** "Search Mail and People".
- Navigation:** New, Delete, Archive, Junk, Sweep, Move to, Categories, Undo, Try the new Outlook.
- Folders:** Focused, Other, Filter.
- Next:** Invitation: Tomorrow at 9:30 AM Agenda.
- Emails:**
  - Laura Liu:** Invitation: Contract Review - Assurity @ Fri 3/1. more details » Contract Review - Assurity When ...
  - Laura Cruickshanks:** New Leads from conference Fri 3/1. Hi Skye, Please import the new leads. -- Laura ...
  - Laura Cruickshanks:** Great to meet you! Thu 2/28. Hi David and Laura, Great to meet you! I'm look...
  - Laura Cruickshanks:** Assurity Corp Meeting 2/14/2019. Hi everyone, I'm cc'ing Skye who can help us wi...
- Three weeks ago**
- Last month**

**Selected Email:**

- Volume Pricing Discounts**
- To:** Gretchen Jadidi <gretchen@assurity.com>
- Send** **Discard** **Show message history**
- Gretchen Jadidi <gretchen@assurity.com>** Fri 2/8, 12:45 PM. Laura Liu
- Hi Laura,**  
My business colleague Diane suggested I contact you regarding the Widget X for my department as a potential add on to our current project. I would like to better understand the business value that the Widget X could provide to my team. Can we meet to discuss?
- Thank you,**  
Gretchen Jadidi
- Happy to meet with you.** **We would be happy to meet.** **I would be happy to meet.**
- Report inappropriate text**

**Calendar Application (Salesforce):**

- Search:** Search
- Compose** **Related** **Tasks**
- Log Email on Send**
- Email Templates**
- Availability**
- Email Tracking** (checked)
- Text Shortcuts**
- Send Later**

**Calendar View:**

- Month:** MARCH
- Events:**
  - Global Conference (Day 1/3)** (March 9)
  - Janine OOO (Day 1/1)** (March 9)
  - Demo for Shift** (March 9, 8 AM - 9 AM)
  - Hold: Company Wide Meeting** (March 9, 9 AM - 10 AM)
  - Lewis Dentist appt** (March 9, 10 AM - 11 AM)
  - Hold Meeting** (March 9, 11 AM - 12 PM)
  - Hold Meeting** (March 9, 12 PM - 1 PM)
  - Getting Better...** (March 9, 1 PM - 2 PM)
  - Tech Talk: The Architecture of Quip** (March 9, 2 PM - 3 PM)

A smartphone is visible in the foreground, displaying the same calendar application.







Select the best time for the event:

Times displayed for WET (GMT+1:00)

Thursday, 8/22

11:15 AM - 11:45 AM

12:00 PM - 12:30 PM

Friday, 8/23

11:15 AM - 11:45 AM

12:00 PM - 12:30 PM

View times in web browser



Reply

Schedule My Visit

Choose your time below:

MORNING

09:00

09:30

10:00

10:30

11:00

11:30

12:00

12:30

AFTERNOON

13:00

13:30

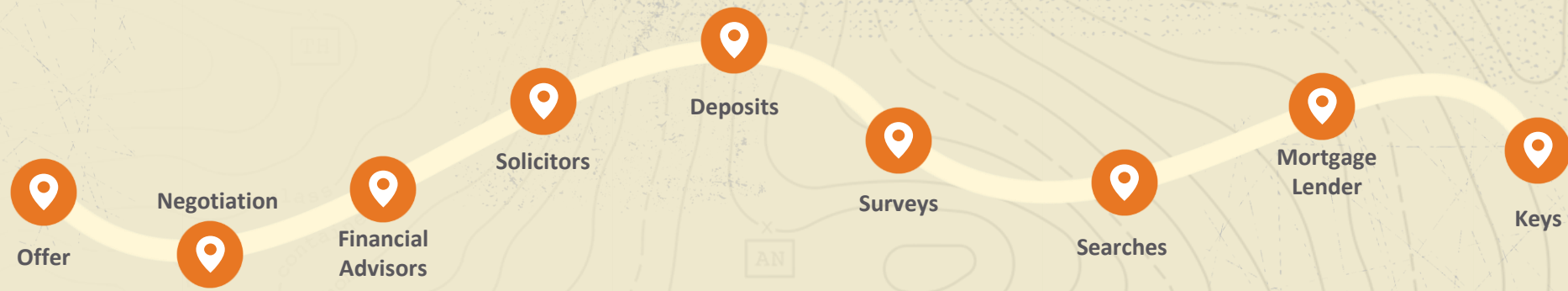
14:00

14:30

15:00







Cloud logo | All | Search Salesforce | Star | + | ? | Settings | Bell | Profile

Sales | Home | Campaigns | Leads | Accounts | Contacts | Opportunities | Quotes | Forecasts | Files | Dashboards | Reports | Quotes

**Opportunity**  
**Tina Tenant - Ealing West Build II** | + Follow | Edit | New Quote | Clone

Account Name	Close Date	Amount	Opportunity Owner	Score
<a href="#">Tina Tenant</a>	20/08/2019	£450,000.00	<a href="#">Etienne de Klerk</a>	Not Available

> | ✓ | ✓ | ✓ | ✓ | **Reservation** | Checklists | Contract Neg... | Approvals | Closed | ✓ Mark Stage as Complete

Details	Contacts	Products	Quotes	Marketing	Files
Opportunity Name				Close Date	
Tina Tenant - Ealing West Build II				20/08/2019	
Amount				Account Name	
£450,000.00				<a href="#">Tina Tenant</a>	
> Opportunity Information					
✓ Marketing Information					
Lead Source				Primary Campaign Source	
Social Media				<a href="#">Twitter Social Listening and Engagment</a>	
> Quote Information					

**Activity** | Chatter | Einstein

**Log a Call** | Email | New Task | New Event

Recap your call... | Add

Filters: All time • All activities • All types | Filter icon

Refresh | Expand All

**Next Steps** | More Steps

No next steps. To get things moving, add a task or set up a meeting.



Email

Password

Login

Forgot your password?

Not a member?

Login with Google

Login with Facebook

Employee? Login here

DocuSign Experience .docx

82%

SEND

HELP OTHER ACTIONS

Name

Email

Company

Title

Text

Checkbox

Dropdown

Radio

DocuSign

Thank you for taking a few seconds to go through the DocuSign experience. This is a sample word document designed with the sole intent of demonstrating DocuSign agreement management, forms completion capabilities and electronic signature capabilities.

There are no special terms or conditions with this sample document, however if there were, it might be important to acquire a signers initials of acceptance in close proximity to these terms \_\_\_\_\_

There are no special terms or conditions with this sample document, however if there were, it might be important to acquire a signers initials of acceptance in close proximity to these terms \_\_\_\_\_

Please tell us about your business today:

Which Department is interested in using DocuSign: \_\_\_\_\_

Which specific Business process is most critical to improve first? \_\_\_\_\_

How do you currently manage this document process? \_\_\_\_\_

What does it cost you today to process complex documents like this? \_\_\_\_\_

How many days does it take you to complete processes like this? \_\_\_\_\_

This agreement might also contain optional initials, where the signer can accept or decline specific terms, like I want to schedule a WebEx with DocuSign \_\_\_\_\_

What is your preferred means for Demonstrations? Face to Face \_\_\_\_\_ WebEx \_\_\_\_\_

You may also need to collect data during the signing process. For an example, we can ask for credit card information, collect changes to a business address or simply as for any other specified information. For this demonstration, we will ask you to choose your favorite sport, which is \_\_\_\_\_

Your birthday: \_\_\_\_\_

It might also be a requirement of the contract or your agreement process to acquire a client's signature, time signature \_\_\_\_\_

Client Signature

Signature

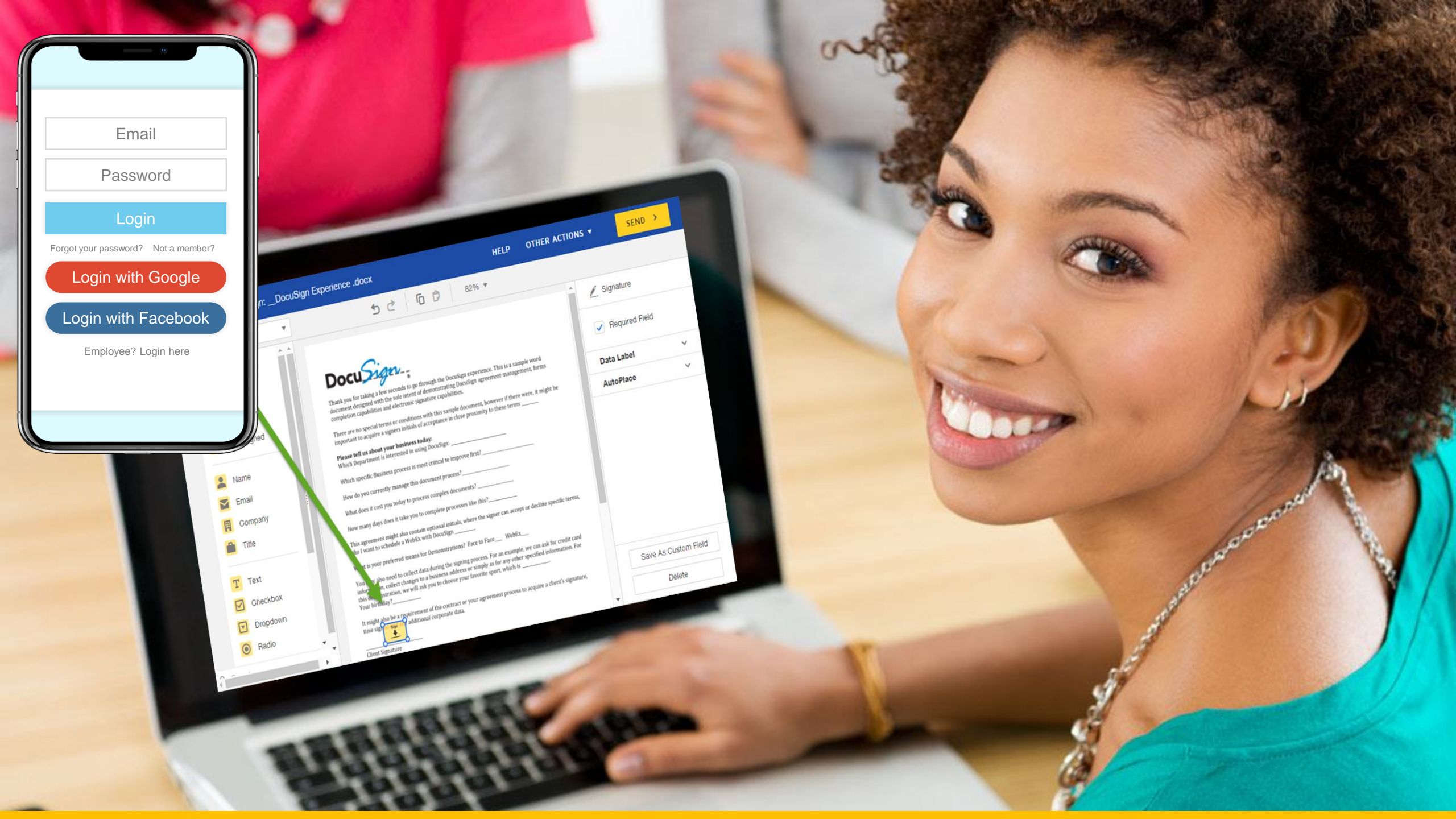
☒ Required Field

Data Label

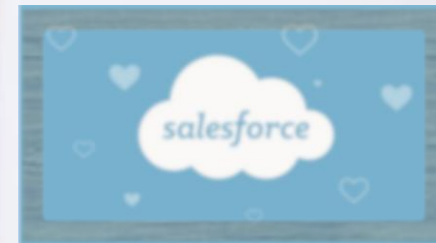
AutoPlace

Save As Custom Field

Delete









thank you

