

The State of Salesforce



Also Featuring



The Future Now Awards celebrates companies that are leading the innovation of customer and employee experiences with Salesforce. Selected from hundreds of submissions, the three winners were chosen by a panel of Salesforce innovation experts based on their approach and associated business results.

The Future Now Awards winners are recognized as creative leaders who go above and beyond their customers' expectations. They are leading the future now as inspirational examples of the success that's possible for companies of all sizes to achieve with Salesforce.

Sales of The Future Now

Your sales goals go beyond hitting quotas. You take the time to understand prospects as people, and continuously work to improve employees' day-to-day workflows.

Service of The Future Now

Your customer service is personalized and consistent across all channels—in a word, customer-obsessed—making more than just an impression, you've earned customers for life.

Marketing of The Future Now

You've discovered the right channels to reach your customers with the content they want, and you've got the measurable KPIs to prove it.



Winner
Verimatrix
B2B | 301–500 Employees
U.S.



Winner
Nextep
B2B | 150–200 Employees
U.S.



warner | music | group

Winner
Warner Music Group
B2C | 3,500–5,000 Employees
50+ Countries

What's Inside

Executive Summary	5
Top Trends	7
Insights From the C-Suite	15
Insights From Sales	19
Insights From Service	27
Insights From Marketing	35
Insights From IT	43
Lightning Insights	49
Global Insights	53
The AppExchange	57
Creating This Report with AI	61

Executive Summary

Executive Summary

Executive Summary

Executive Summary

Executive Summary

Executive Summary

Executive Summary

Executive Summary



Herbie Hancock, the jazz great, once said, “Jazz is about being in the moment. It’s not exclusive, it’s inclusive.”

Businesses today have to be the best listeners: How can they be in tune with every click, call, tap, and share? It’s a cacophony of information that can overwhelm companies of all sizes. As we uncovered in this year’s report, finding and accessing customer data from different sources is the most common operational challenge across Sales, Service, Marketing, and IT. But if you’re able to listen closely, to pick up on the tones and full range of both structured and unstructured data—good and bad—you can hear the rhythm of your customers, the sound of every note they produce, and use that data to stay agile and relevant.

Augmented Intelligence (AI) is the vehicle that can allow businesses to use data at scale to connect more deeply than ever before.

But, despite the widespread enthusiasm and anticipation surrounding AI, about half of all businesses aren’t prepared to adopt it. The global strategic partnership between Salesforce and IBM is proof positive of how AI is becoming more accessible to everyone—and evidence that businesses need to seriously plan for AI now. Salesforce built the world’s #1 CRM and developed its Einstein AI capabilities to facilitate more personalized, one-to-one relationships between businesses and their customers. IBM built the world’s most advanced machine learning system for better relationships between people and technology. Together, the combined AI capabilities of IBM Watson and Salesforce Einstein can connect us more deeply than ever before, leading to real business outcomes.

The goal of every The State of Salesforce report is to inspire innovation with information. This year’s report provides a deep look into how businesses are thinking about, investing in, and using AI, analytics, and transformation initiatives on the Salesforce platform. Use these insights to tune your Salesforce investment to the soundtrack of your business. I hope you enjoy Bluewolf’s sixth-annual The State of Salesforce.

Eric Berridge
CEO & Co-Founder
Bluewolf, an IBM Company

To Trends

Top Trends

Top Trends

Top Trends

Top Trends

Top Trends

Top Trends



1

AI Means Business Now

Companies are realizing growth with AI for CRM as Salesforce Einstein presents unprecedented opportunities for customers. The anticipation for how AI can transform business processes is driving investment for early adopters and experimentation. **77% of Salesforce customers who already use AI expect to increase their investment in AI or platforms that have embedded AI capabilities, within the next 12 months.**

2

CX Goes Mainstream

A strategic focus on customer experience (CX) is now table-stakes. In the digital business era, IT and business stakeholders are equally responsible for delivering valuable customer experiences. With IT becoming customer-obsessed alongside business stakeholders, the best companies are optimizing their CX strategy with IT as a strategic partner to not only manage customer-facing tech but to transform it. **88% of IT professionals say the top two reasons their organization uses Salesforce is for customer acquisition and retention, above all other business goals.**

3

Analytics For Everyone, If You Have The Data

A data-first culture is driving superior employee experiences. Analysis of dark data, like customer sentiment or email correspondence, has become too important to ignore. Analytics is transforming how employees use technology, enhancing their capabilities, and boosting their performance by favoring insights over intuition. **71% of Salesforce customers are increasing their investment in actionable analytics.**

1

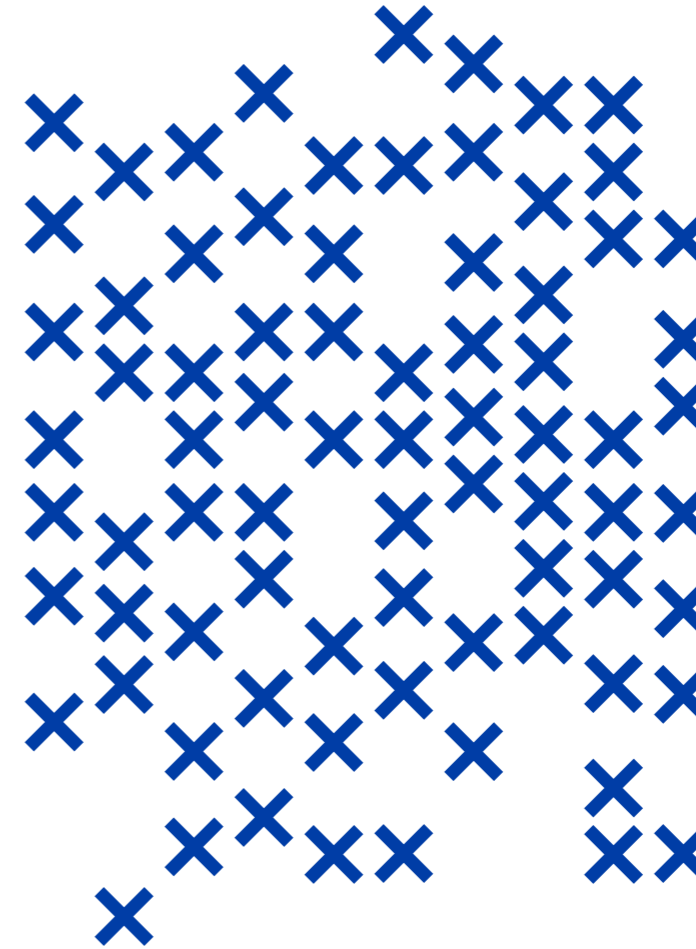
AI Means Business Now



The anticipation that surrounds AI is driving a surge of early adoption and experimentation. 38% of Salesforce customers expect to invest in AI within the next 12 months. The best companies are embracing the increasing necessity for smarter, faster decision-making by embedding AI capabilities

into Salesforce across the entire organization. Companies that already use AI are experiencing a return on intelligence: 77% expect to increase their investment in AI or platforms that have embedded AI capabilities, within the next 12 months.

Of companies currently using AI



77% plan to increase their investment in AI

Companies already using AI within Salesforce are sending a powerful signal to the marketplace that AI is living up to its expectations for measurable business impact.

Of companies not currently using AI



20% plan to increase their investment in AI

2

CX Goes Mainstream

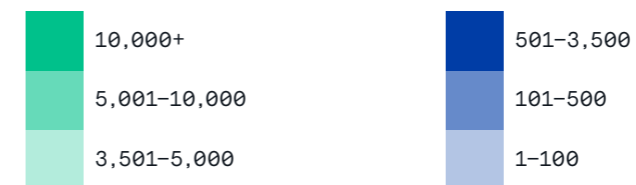
The role of IT has evolved beyond solely taking care of an organization's technical infrastructure, to align with business stakeholders. Technology-driven changes in customer preferences for personalized, digital, anytime and anywhere engagement has put pressure across the entire organization, including IT, to deliver customer experience. As the designated owner of the Salesforce platform for over a third of Salesforce organizations, IT is now front and center to enable business transformations that enhance the customer experience.

Is IT responsible for your Salesforce instance?

In companies of all sizes, IT has become a critical component of delivering quality customer and employee experiences.



Number of Employees

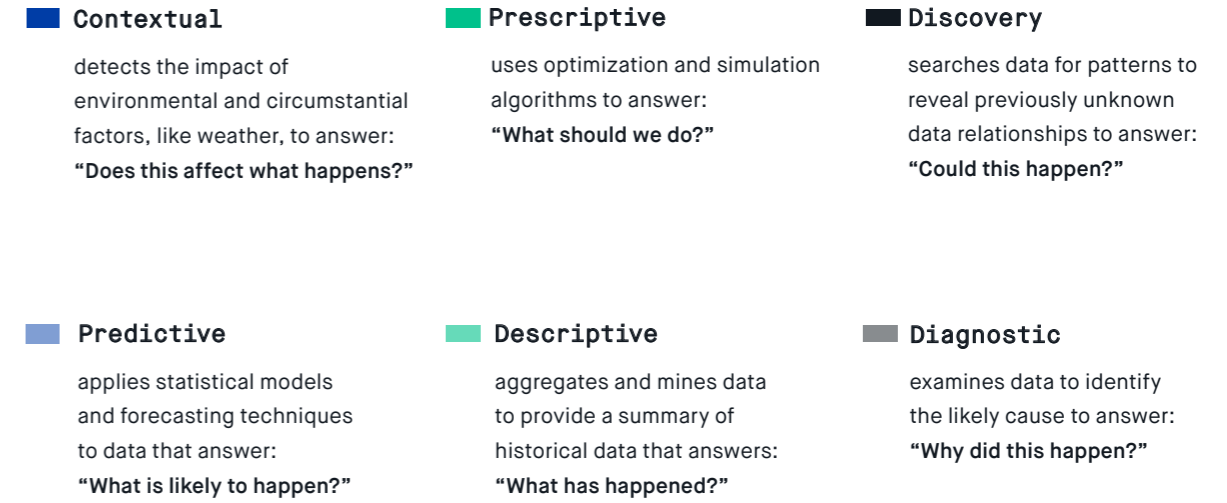


3

Analytics For Everyone, If You Have The Data

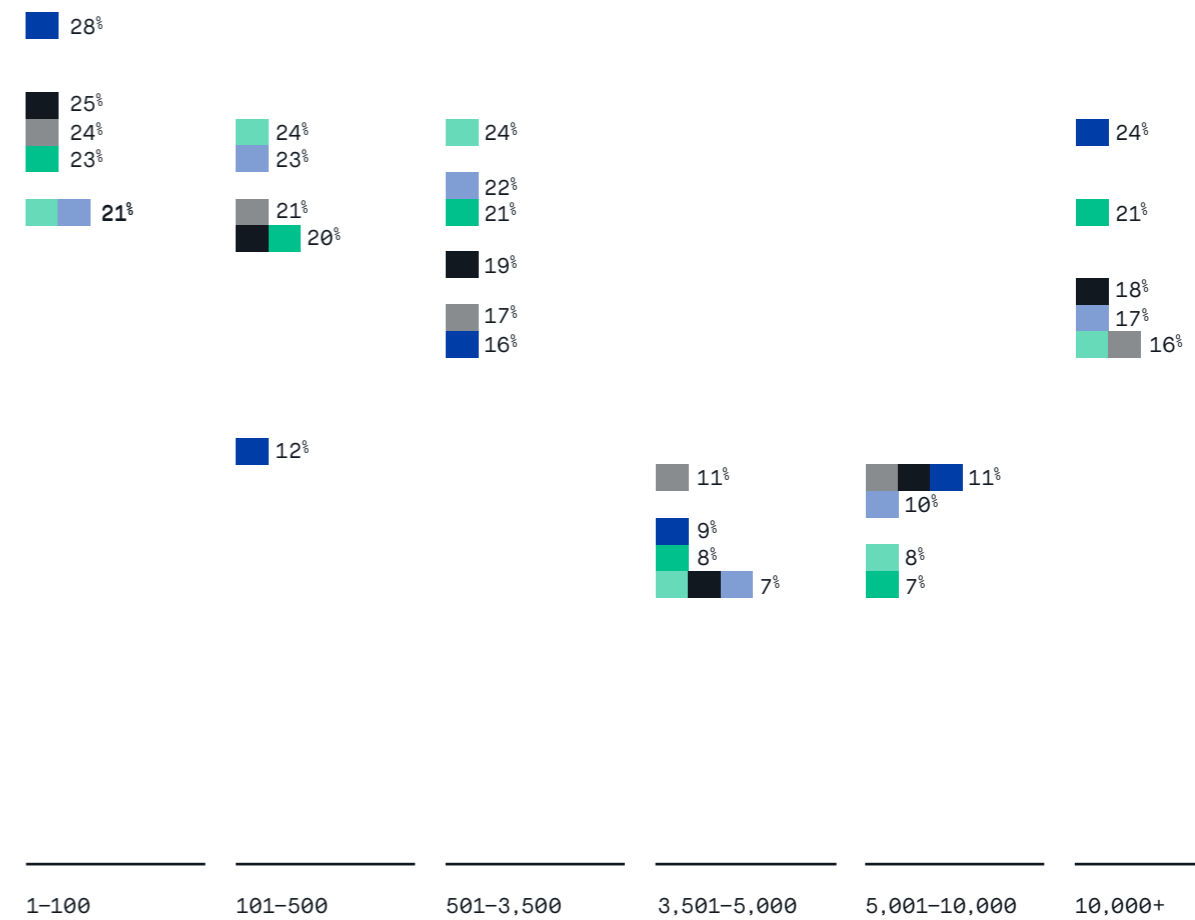
The flexibility of Salesforce allows for data-based decision-making to happen at any scale. Within the next 12 months, 71% of organizations will increase their investment in making analytics actionable. Analysis of dark data, such as customer sentiment or email correspondence, has become too important to ignore. More companies are realizing the need to meet customers where they are, increasing investment

in descriptive analytics as the entry point to more advanced capabilities. SMBs are expanding their investments, just as mid-level companies are increasing investment in more sophisticated capabilities. We expect that this trend will continue to move downstream to a broader spectrum of small- and medium-sized businesses as Salesforce Einstein functionality continues to mature.



The demand for advanced analytics now spans the entire spectrum of company sizes.

Percentage of investment in six categories of analytics.



Insights From The C-Suite
 Insights From The C-Suite
 Insights From The C-Suite
 Insights From The C-Suite
 Insights From The C-Suite
 Insights From The C-Suite

CEOs Place Big CX Bets On AI

The C-suite recognizes AI as a leadership opportunity for differentiating the customer experience. In the next 12 months, 59% of C-level executives expect to purchase AI or platforms that have embedded AI capabilities, and have a keen eye for enhancing the central hub of direct customer interaction: customer service and support. Their vision of faster, smarter decision-making capabilities extends to self-service that empowers customers and employees equally.

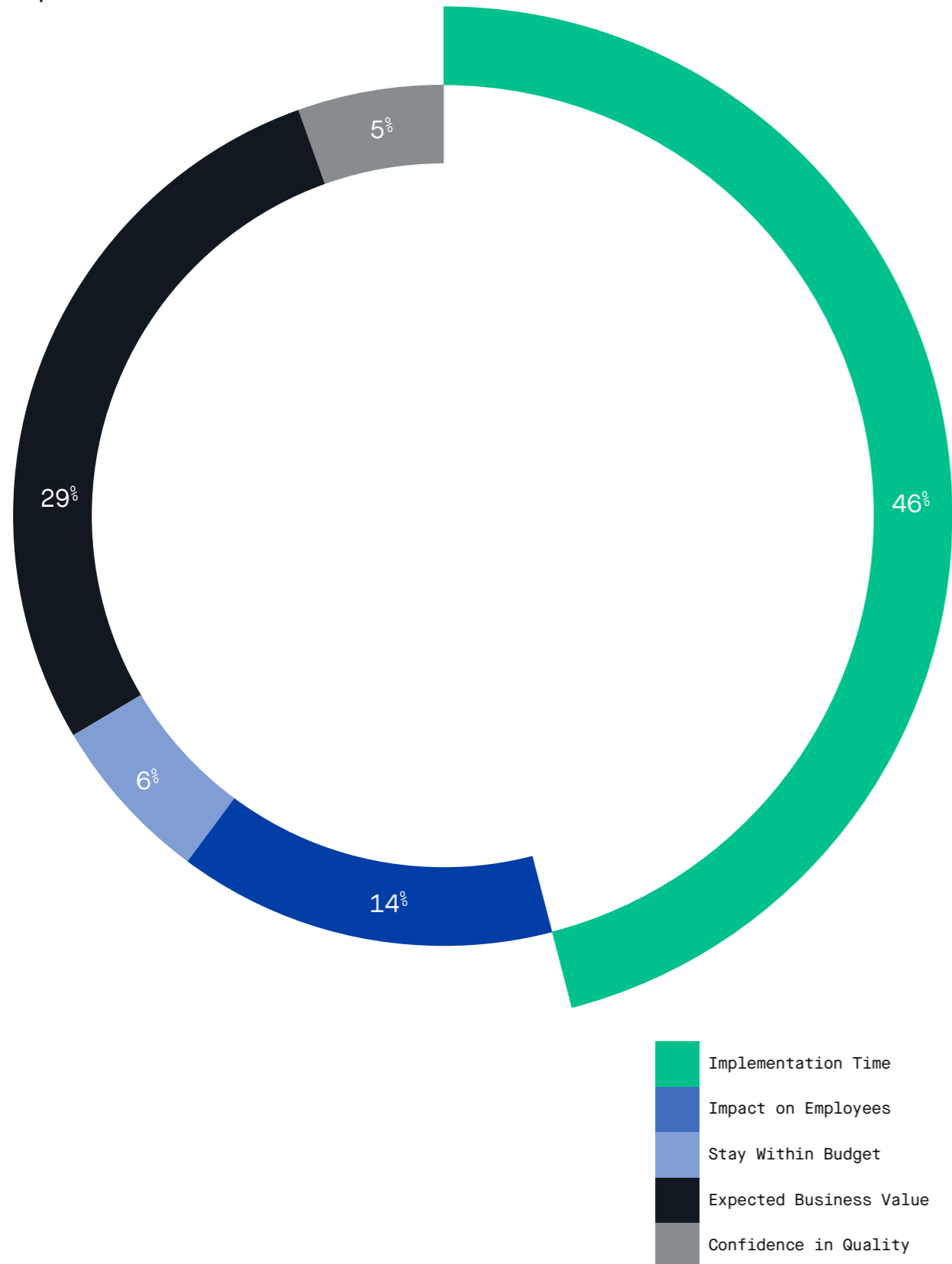


63% of C-level executives are counting on AI to improve the customer experience.

Within your organization, where do you expect AI to have the greatest impact?

- Collaborating
- Performance in New Channels
- Cost & Safety
- Reputation Building
- Other
- Overall Effectiveness
- Opportunity Qualification
- Customer Care/Satisfaction

For 46% of the C-Suite, the most important factor when implementing a new Salesforce initiative is implementation time.



Implementation Time Is Money



60% of C-level executives report that the top reason their company uses Salesforce is to grow revenue. However, just 36% measure the ROI of their Salesforce investment. The leadership role of the C-suite comes with an urgency to demonstrate ongoing progress and continuous innovation. Speed counts as a measure of value. The best companies are aligning Salesforce to prioritize

new initiatives based on both impact and time-to-value. A cost-benefit analysis should make the distinction between short-term and long-term ROI—activities you can track on an ongoing basis—as well as YoY performance. Quantifying the business impact of Salesforce within a set period of time can ensure strategic initiatives align to business goals and measurable ROI.

“With AI, our global distribution efforts are enhanced with precision around both who and how to engage to better serve our investors and prospects.”

Kurt MacAlpine
Executive Vice President
Head of Global Distribution
WisdomTree

Insights From Sales
Insights From Sales
Insights From Sales
Insights From Sales
Insights From Sales
Insights From Sales

Insights From Sales

Over half of Sales leaders agree: Having a 360° view of the customer is the most critical factor to driving Sales effectiveness. But less than half of salespeople believe they actually have a full customer view. By connecting back-end systems to create a unified view of the customer, the best-performing sales teams are able to leverage data from across the enterprise to improve decision-making, qualify sales leads faster, manage opportunities with greater personalization, and deliver the kind of customer experience that generates repeat business.

"I make sure in advance that the sales people are in those early stages, where they have a chance to input and agree on the required data and fields, before implementation. Having a typical user present in the planning stages helps with adoption."

Gwyn Reich
Director, Sales and
Marketing Operations
Harvard Business Publishing

38% Companies with an incomplete customer view reporting disparate systems

No surprise, sales organizations with a 360° customer view are 3x less likely to have disparate systems.

The Path To A Single Customer View Is Paved With Data

Sales Cloud adoption grew 13% over last year*, and adoption is expected to accelerate with Sales Cloud Einstein, which enables faster, smarter, data-based decision-making. However, organizations that have built their sales processes and tech stack on an ad hoc basis with technologies outside of Salesforce are now overwhelmed by dark data. To take full advantage of Sales Cloud Einstein, data needs to be unified across sources. The best companies are consolidating disparate systems and making data more readily accessible at every stage of the funnel, shortening sales cycles and enabling sales teams to focus more time on selling.

*Salesforce Investor Relations report, 2017

12% Companies with a complete customer view reporting disparate systems

The Search Is Over: Guided Selling Is On The Rise

Sales teams are looking for signals and insights to augment their day-to-day selling activities. With data analytics, the search is over. 58% of sales organizations will increase their investment in actionable analytics, which reveal new opportunities to connect with customers and prospects, within the next 12 months.

In which type of analytics is Sales investing?

53% Predictive

applies statistical models and forecasting techniques to data that answer: "What is likely to happen?"

49% Descriptive

aggregates and mines data to provide a summary of historical data that answers: "What has happened?"

48% Discovery

searches data for patterns to reveal previously unknown data relationships to answer: "Could this happen?"

38% Diagnostic

examines data to identify the likely cause to answer: "Why did this happen?"

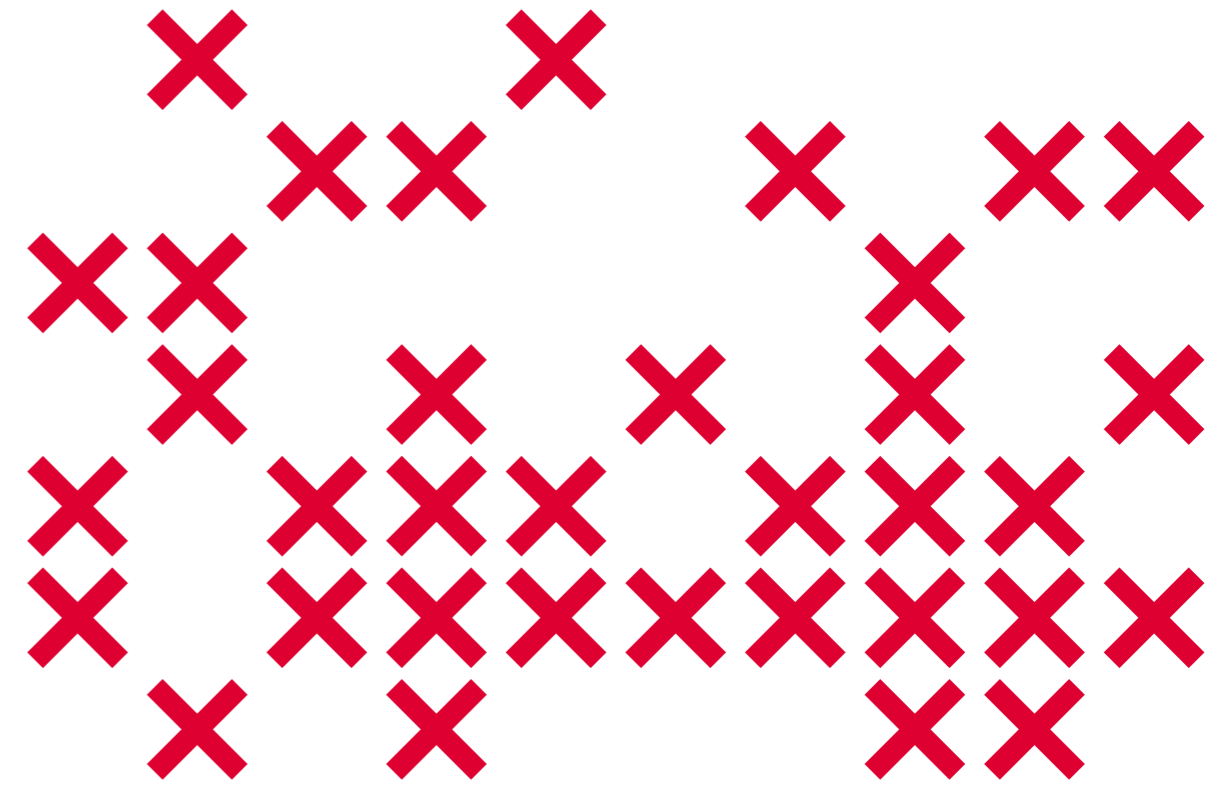
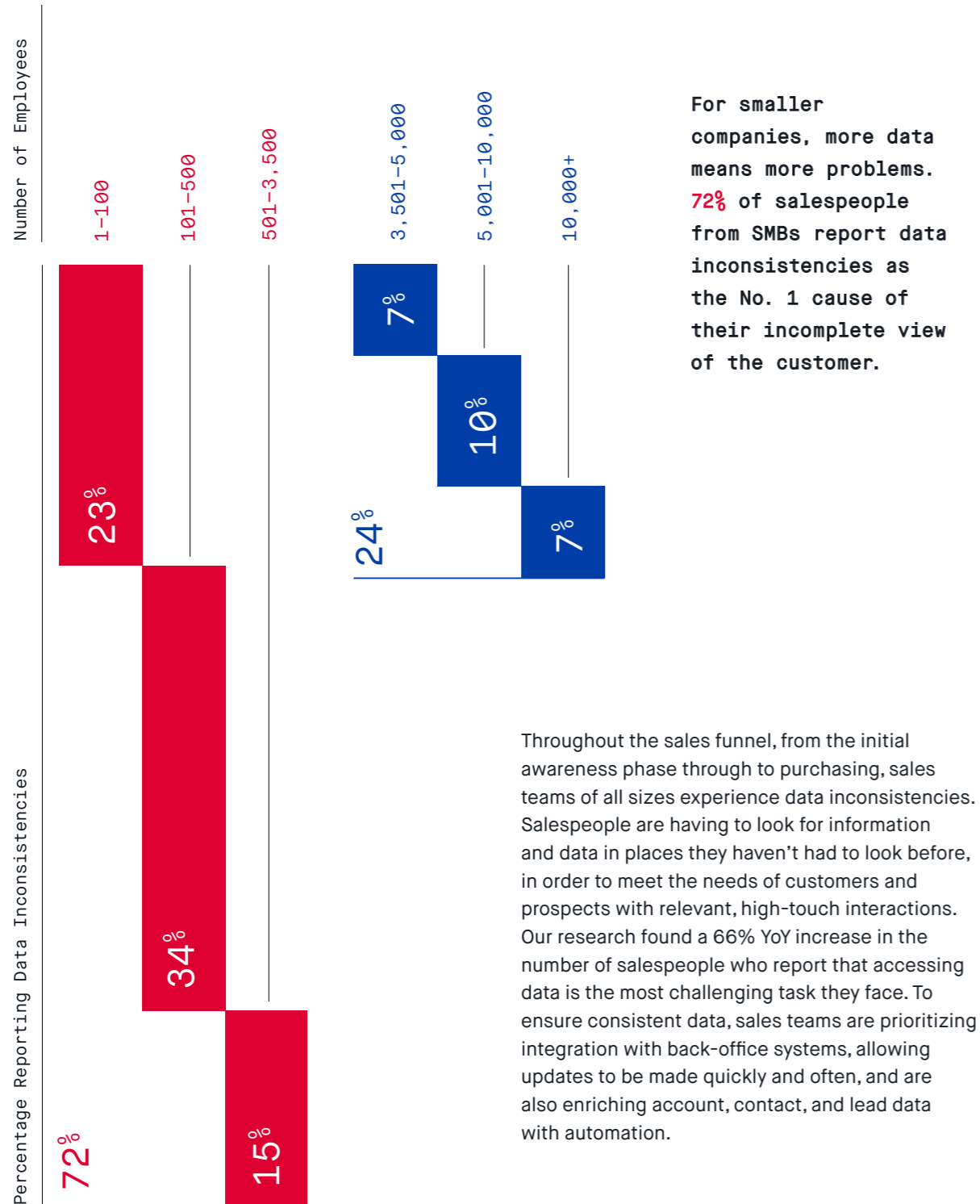
32% Prescriptive

uses optimization and simulation algorithms to answer: "What should we do?"

8% Contextual

detects the impact of environmental and circumstantial factors, such as weather, to answer: "Does this affect what happens?"

Nurture Data Like You Nurture Opportunities



Supercharge Your Sales Funnel

35% of Sales organizations investing in AI within the next 12 months expect it will have the most impact on qualifying leads.

For Sales, faster filtering means a faster funnel, and an easier time focusing only on the deals that will count. The best companies are reinforcing pipeline accuracy and enhanced forecasting by augmenting the sales funnel with AI-powered apps, like Einstein Opportunity Insights and Einstein Lead Scoring.

53% of salespeople already using AI or platforms with embedded AI capabilities in their business expect to reinvest within 12 months. Simultaneously, the percentage of salespeople using AI is expected to increase by 17% during that time.

Future Now Awards



“Salesforce removes friction in our business and without it, we couldn’t sell new product lines on a global scale.”

Brittany Tankhim
Director
Enterprise Applications
Verimatrix

Sales of The
Future Now

Saving A Bundle With Product Bundling Capabilities

Salesforce Products

Sales Cloud, Service Cloud,
Community Cloud,
Einstein Analytics, CPQ



Already an innovator in its own right, Verimatrix is a California-based company that offers the only platform for securing and increasing revenue for multi-network, multi-screen digital TV services around the globe. Its sales team had been using Excel spreadsheets to track quotes, orders, and revenue recognition, but was quick to notice how their manual sales process was prone to errors and inconsistencies.

INSIGHT
Product bundling should benefit
sellers and customers.

The transition to a new quote-to-cash system needed to happen at scale for Verimatrix’s network of resellers, and Sales and Service needed to be kept in the loop throughout the replacement process.

IDEA
Automate and centralize Sales

A Configure Price Quote (CPQ) tool combined with Salesforce Community Cloud for Verimatrix’s sales partners created custom contracted pricing, so now resellers of its products receive a discount for selling particular product groupings. Overall, Verimatrix can bundle products and logic to make it easier for salespeople to quote commonly sold systems together with ease and speed.

IMPACT
Closing deals globally

What used to take a week now takes only a few hours, and Verimatrix creates a price quote with assured accuracy and traceability. By shortening the time between quotes and order submissions, Verimatrix has the internal sales team efficiency to sell its new product line on a global scale.

Ins s Fr m Se e

I ts m vice

Ins Fr m Se ice

I hts om Serv e

In hts Fr S e

In ts Fro rvic

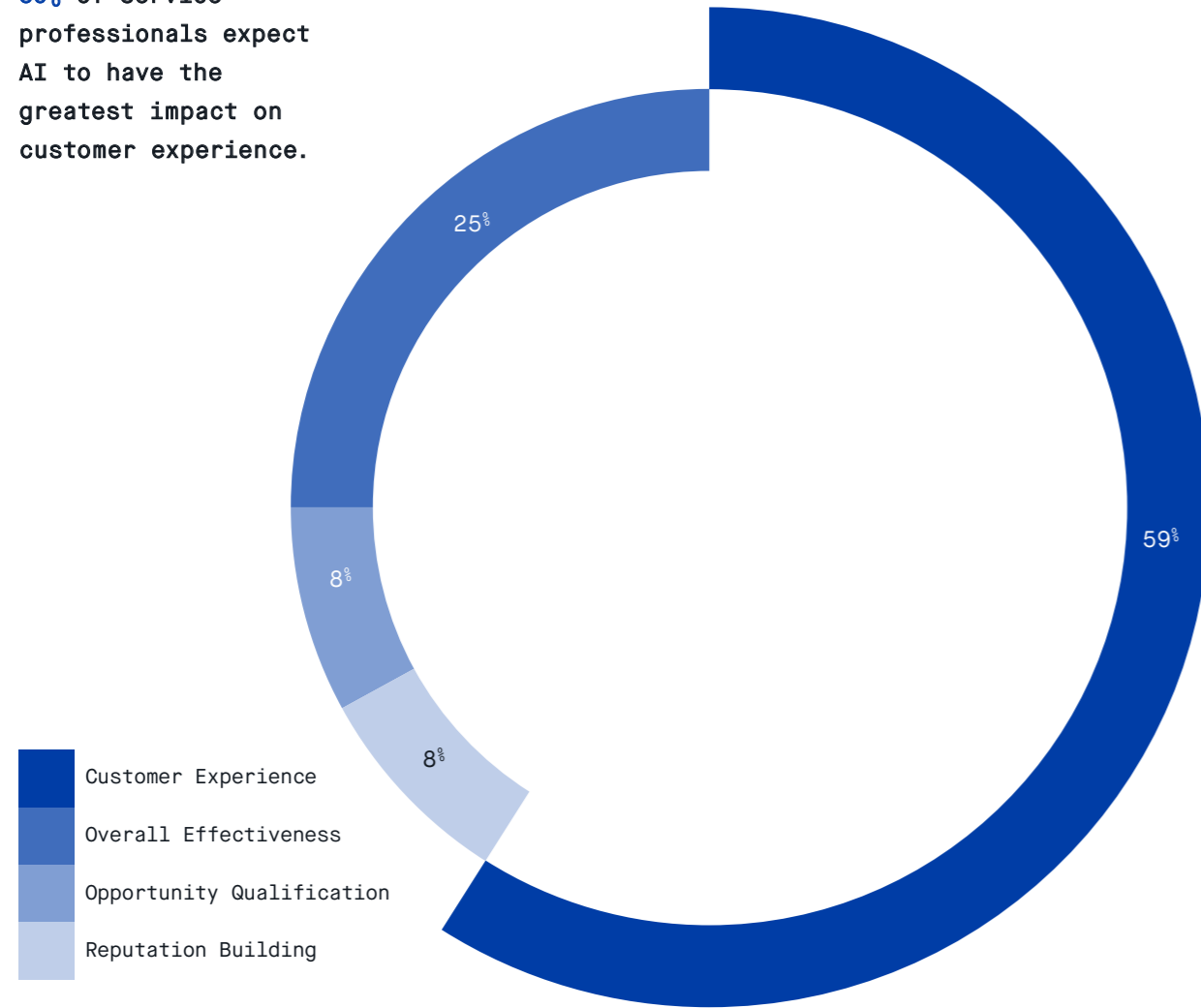
Insights From Service

The demand for anytime, anywhere, personalized customer service is quickly giving rise to AI-enhanced self-service capabilities that take the form of real-time conversations facilitated by chatbots. As a type of conversational app, chatbots have Natural Language Processing (NLP) capabilities to respond to questions from customers, augment knowledge management for contact-center agents, and automatically escalate cases to a live agent when necessary. 26% of Service professionals expect to invest in AI capabilities within 12 months to enhance their service and support centers with conversation capabilities that improve call deflection and increase first contact resolution without compromising quality of service.

“To realize agents’ full value, look beyond immediate outcome measurements and invest in long-view initiatives by committing to predictive service.”

Bob Furniss
VP, Global Service Cloud Practice
Bluewolf, an IBM Company
International Customer Management Institute
(ICMI) Lifetime Achievement Award recipient

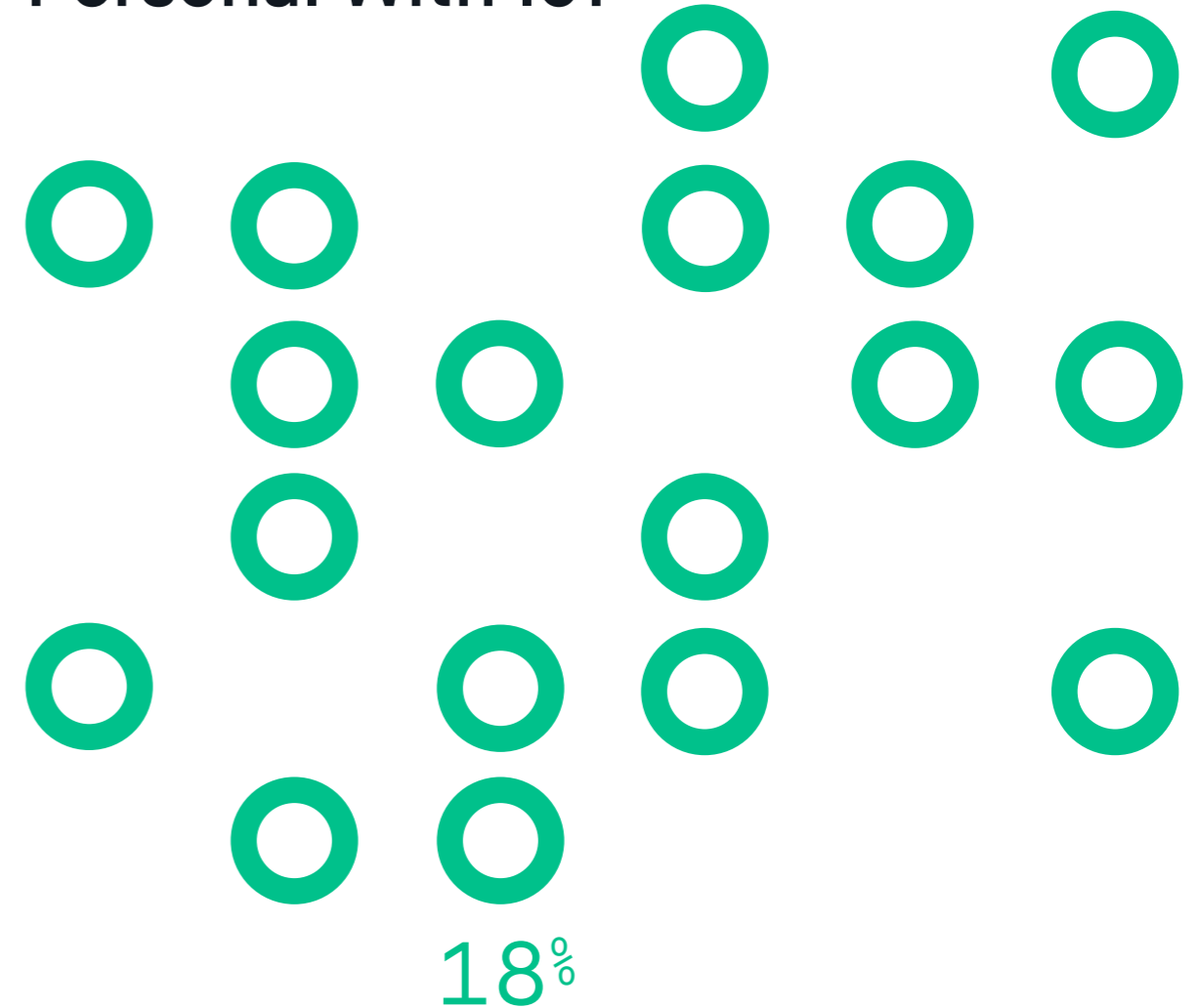
59% of Service professionals expect AI to have the greatest impact on customer experience.



Service Wants To Solve Problems, Not Search For Answers

When it comes to customer service, a seamless experience means self-service. Technology-driven changes in customer preferences are demanding 24/7 support that goes beyond Salesforce Community Cloud and customer portals. Real-time messaging is already a standard of digital engagement for customer service agents using Service Cloud Einstein and Lightning Snap-ins to integrate in-app chats across mobile and web experiences. 15% of service organizations have invested in AI self-service capabilities as they look to add a conversational interface that can automatically retrieve insights from Salesforce data; anticipate needs by customer history, context, preferences, and search history; and deliver proactive alerts and relevant offers, and escalate issues to a live agent when necessary. For Service professionals, AI provides valuable context to delivering quality customer experiences across all channels.

Field Service Gets Personal With IoT

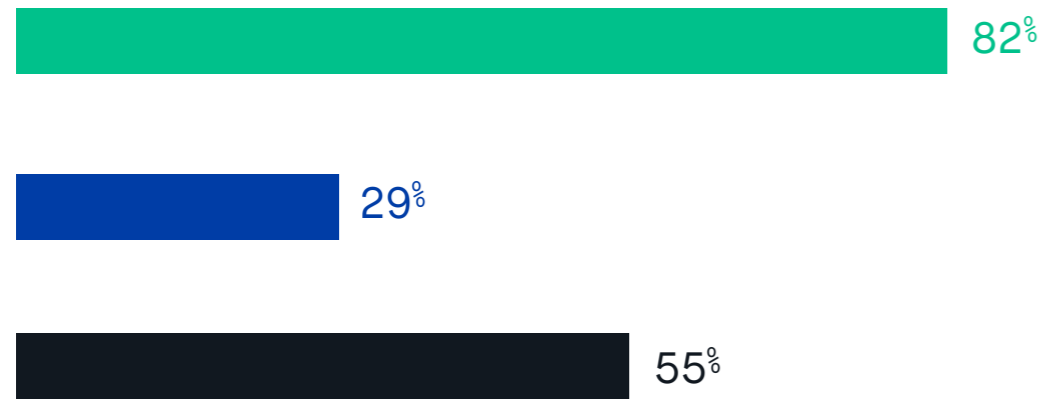


of organizations plan to invest in IoT Cloud in the next 12 months.

Service technicians are undergoing a retooling of their capabilities with wearable devices and AI-powered field apps. Field service professionals are now able to further differentiate the customer experience through connected data. Field service organizations on Field Service Lightning can be proactive and predict a need for maintenance, optimize scheduling of repairs, and detect a signal for help. IoT for Service and Support is

an emerging trend in the early stages of mass-adoption: 14% of service organizations have either transitioned to Field Service Lightning or plan to in the next 12 months, as a requisite step for adopting IoT Cloud. The best companies are combining their Salesforce data with IoT to increase the connectivity of their field service operations and deliver personalized service with precision.

Employee Community Supports A 360° Customer View



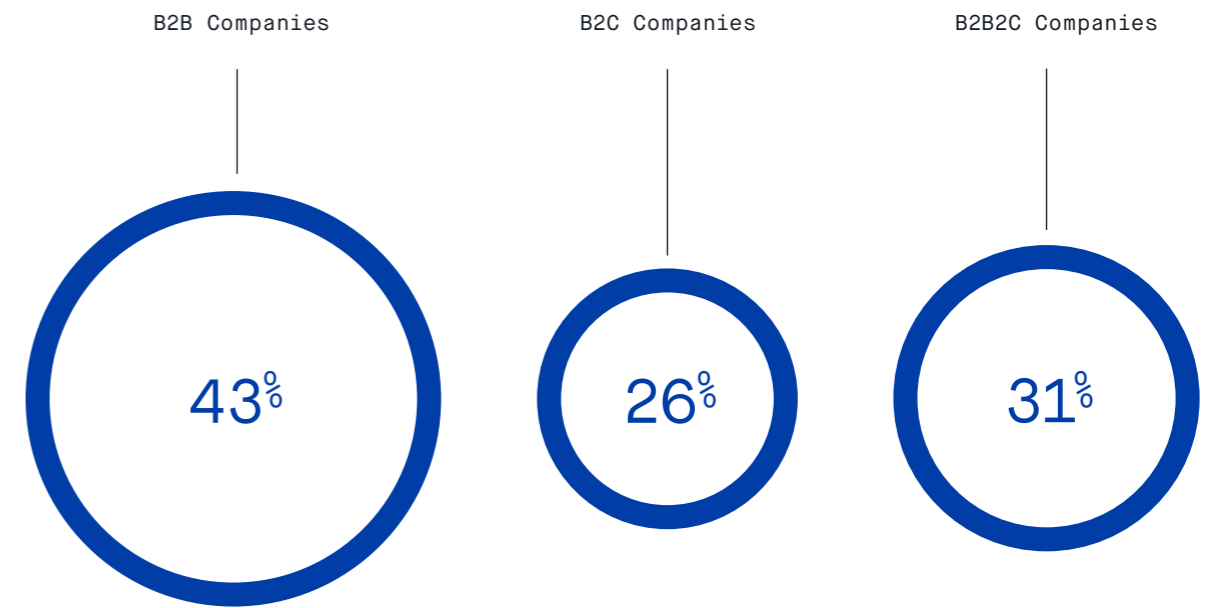
We are investing in Customer Communities within 12 months.

The best companies are looking to future investment in Customer Communities to expand the reach of their brand's digital experience.

Customer service communities were the initial marquis use cases for communities. However, this has quickly expanded beyond Service to other parts of the business, supporting employees, customers, and partners. Historically, employee communities were easier to own and manage, so it's no surprise that today 59% of Community Cloud deployments are focused on helping employees work more effectively. As part of

fostering a data-driven culture, the best companies are looking to build on their investment in employee communities to provide useful insight into members' behavior. Using analytics to examine community interactions can reveal additional context that can be added to the profiles of prospects and customers.

Who is investing in predictive analytics?



B2B companies investing in predictive analytics have greater accountability across the entire organization to track end-to-end visibility of the customer lifecycle.

Service Can't Wait To Anticipate

Contact channels are expanding rapidly, producing more data—both structured and unstructured—than service organizations can put to use with actionable insights. Just 10% of Service professionals report that their company analyzes dark data, which includes unstructured data, such as text messages, documents, email, video, audio, and images. 53% of Service organizations are increasing their analytics investment within the next 12 months. However, the best companies are investing in more forward-looking Service Cloud Einstein Analytics capabilities, including Contextual data, such as weather, which enables agents to anticipate customers' needs before issues arise.



Future Now Awards

“We’ve seen an overwhelmingly positive response from clients. Some who have considered leaving have renewed their contracts based solely on their new access to our interactive dashboards and decision-making tools.”

Adam Graham
Chief of Sales & Marketing
Nextep, Inc.

Service of The
Future Now

Redesigning Human Resources With Data

Salesforce Products

Service Cloud, Sales Cloud, Community Cloud, Marketing Cloud, Pardot, and Wave Analytics for Community Cloud

Among the first Professional Employer Organization (PEO)s certified by the IRS, Nextep has grown into a 100+ employee company that covers administrative services, such as human resources, benefits, payroll, and risk & compliance, for small- to medium-sized businesses. Like many small businesses, Nextep’s customers struggled to access data about their workforce in a meaningful and simple way. As a service designed to simplify HR, Nextep worked quickly to address this need and to be first to market in its industry with a leading-edge analytics product.



INSIGHT

No two reporting needs are exactly alike

For Nextep customers to obtain basic but meaningful data, such as their total labor costs, they were having to run multiple reports, download those reports, and then combine them together in Excel—not an uncommon experience for most small businesses. Overall, accessing data to surface insights required too much time and effort.

IDEA

Customer care that comes with customization

By identifying its customers’ primary pain points through continuous feedback, Nextep now has three primary dashboards: Employee Engagement, Pay Allocation, and Benefits Enrollment. Customers can quickly and easily get meaningful insights from the dashboard or slice and dice data to create custom reports. By integrating Wave Analytics for Salesforce Community Cloud, Nextep customers can access insights about their workforce, labor expenses, and benefits participation, using data that had previously been dark.

IMPACT

Human Resources with a human touch

Nextep’s employee engagement dashboards enable customers to foster more meaningful relationships with their staff. Customer retention is up, and the company’s Net Promoter Score (NPS) among client administrators and key decision makers is at an all-time high of 89. With its new interactive dashboards and data analytics, Nextep is fulfilling its why: “Elevating the employment experience & enriching people’s lives.”

In hts F m Mar i g

I ts om Mar et g

In gh Fr Ma et g

In h s F Ma ing

Ins hts Fr m Mar ting

Ins ts m a e ing

Insights From Marketing

No longer just brand stewards, marketers now have the dual responsibility of proving ROI and designing multichannel campaigns that generate demand. The best companies realize that their unique data is their greatest competitive advantage to delivering the experiences customers expect in real-time. Investing in collaborative initiatives with Sales and IT is now a part of a marketing strategy that focuses more tightly on customer experience and retention, extending the impact of marketing through the entire customer lifecycle. Because marketing complexity is at an all-time high, with nearly 4,000 tools available, just 17% of marketers can measure Marketing influence and prove ROI. The necessity for simplifying tech stacks is now driving data-driven and technology-supported marketing strategies throughout the customer journey.

“There is no excuse for not knowing your customer, and your customers know it. The opportunity to use insights to serve them is bigger than ever and unmissable.”

Corinne Sklar
Global Chief Marketing Officer
Bluewolf, an IBM Company

Lead With Better Leads

With traditional rules-based lead-scoring approaches MQL might as well stand for “mysterious qualified leads.” Today, marketers have all the tools they need at their fingertips to acquire new customers and use what they’ve learned to optimize campaigns. And yet, just 16% of marketers surveyed use Salesforce capabilities to manage the funnel, identify priority accounts, and measure influence and prove ROI. To generate Sales-ready leads, 24% of marketers have

combined the capability of one or more Salesforce Clouds, to draw from a more robust data set. The best companies are optimizing the Marketing-to-Sales lead handoff by providing data-rich profiles that offer Sales more than just a snapshot of a lead. By combining marketing data with sales opportunity data, Marketing can improve its lead-scoring model with full visibility into engagements with prospects.

Marketers who integrate marketing and transactional data are **40%** more likely to be able to prove ROI.

Marketing can prove ROI



Companies that have combined clouds

Companies that have not combined clouds

Every Marketing organization is increasing its analytics investment in predictive capabilities within the next 12 months.



Percentage of marketers investing in predictive analytics based on how they use Salesforce

Optimize The Moments That Matter

The customer journey is fragmented. Customers expect a seamless brand experience as they move between physical and digital channels. The biggest challenge of omnichannel marketing is designing and delivering 1:1 customer journeys while optimizing media spend—using the right insights at the right time. High-performing B2C companies recognize Salesforce Marketing Cloud Journey Builder, coupled with Einstein Analytics, as their best ally to execute

an insights-driven customer engagement strategy and anticipate blind spots. Whether Marketing is merely syncing data with Salesforce—31%—or using Marketing Cloud with Einstein capabilities to predict and automate the next, best action—4%—every Marketing organization is increasing its analytics investment in predictive capabilities within the next 12 months.



Future Now Awards

“Marketing Cloud made it possible to deliver on our value proposition to fans by effectively reaching many audiences in a personalized way with relevant information from their favorite artists”

Itay Rahat
Sr. Director, Fan Engagement
& Consumer Marketing Platforms
Warner Music Group

Marketing of The Future Now

Salesforce Products
Marketing Cloud



warner | music | group

Setting The Stage With Programmatic Campaigns

Warner Music Group (WMG) is the only American music conglomerate worldwide and the third-largest recording company in the global music industry. Its CRM team supports 40 offices and territories and oversees 12 marketing technology platforms among 1,000 business units and across over 1,000 brands. The WMG CRM team set out to increase engagement by making sure fans know whenever their favorite artists are in town.

INSIGHT
When bands go on tour, their fans can be nurtured into digital groupies

In response to the disruption of streaming services and digital download, live-touring is now the most significant source of revenue for artists and labels, happening with every new album cycle and averaging 30 live dates. WMG's email production team handles hundreds of email builds every month for WMG labels and artists, who all have their own branded templates. Producing and qualifying thousands of emails that include specific details about upcoming shows in a fan's area required hundreds of production hours. The segmenting, approval process, and sending needed to be programmatic to be relevant.

IDEA
Make your fan base fit to scale

To build a fully scalable automated email program, WMG developed a set of APIs to help route, cleanse, and validate fans' data, as well as trigger and customize email campaigns. With its contextual marketing product partner, StoryPorts, WMG also overlaid the Bandsintown Event Widget API onto its Salesforce Marketing Cloud accounts. StoryPorts content radar listens to the BandsInTown API for particular artists and initiates an email build. The emails include concert ticket links, venue names, and show dates and locations, which are pulled from the API. The system identifies the market of the concert and subsequently creates a geo-targeted segment of the artist's fan list, via a programmatically updated filter in Salesforce Marketing Cloud.

IMPACT
Open rates that feel like an opening night

WMG has rolled out its targeted fan emails for over 40 complete North American tours. Since launching, WMG artist fans are engaging with their favorite bands and are tuned into when artists will be playing nearby. Email opens have doubled, and click-through rates have tripled. Hundreds of production and QA hours are saved, allowing the CRM team to scale other programs even more. WMG's innovative email program delivers a personalized experience that is authentic to the artists and fosters fan loyalty.

In hts F T
I si s m T
Ins t rom I
nsi s om T
I i ts Fr I
Insigh F om I
Insights From IT

The growing significance of AI as a market differentiator means that a business transformation involves a data transformation too. For IT, creating a roadmap that prioritizes data governance and management is now a part of their role as a cross-functional innovation partner. While they own the technical aspects of their organization's Salesforce Platform, they also serve as an internal catalyst for business transformation and strategy. Over a third of organizations report that IT is ultimately responsible for their Customer Success Platform. More tightly aligning its tech stacks to business goals, IT is integrating emerging technologies across business units that foster the competitive advantage of advanced analytics and AI capabilities.

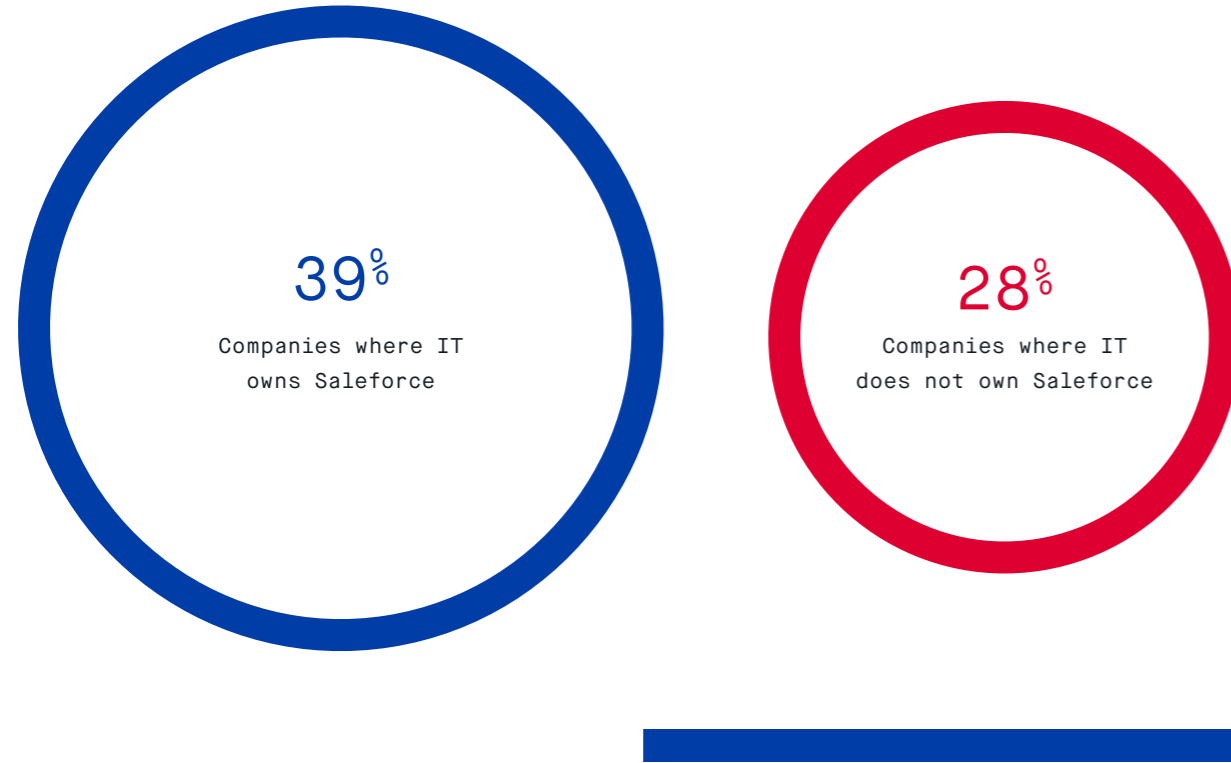
"An end-to-end business transformation begins with understanding how technology can support your people, not the other way around."

Cindy Breshears
Chief Transformation Officer
Bluewolf, an IBM Company

When IT Leads, AI Thrives

IT can more effectively foster a company culture that embraces AI's emerging capabilities when it also has a greater share of platform responsibility.

Who understands the benefits of AI?



A reactive approach to innovation is a losing strategy to keep pace with customers' expectations in the digital business era. Today, IT is facilitating business transformation as an internal innovation partner to foster better customer experiences with data-driven insights. Business units are increasingly relying on IT to integrate speed, agility, and the competitive advantage of AI-powered capabilities into how they deliver customer experiences. 16% more employees understand the opportunity for AI to benefit their business if IT is at the helm of their Salesforce org. While much of IT's work goes unseen, they're now at the forefront of driving customer interaction through tech-based initiatives, such as improving data management capabilities for proactive customer engagement and leveraging Salesforce data through advanced analytics.



If IT owns Salesforce, then an organization's use of the platform is 3x more likely to be optimized for ongoing innovation.

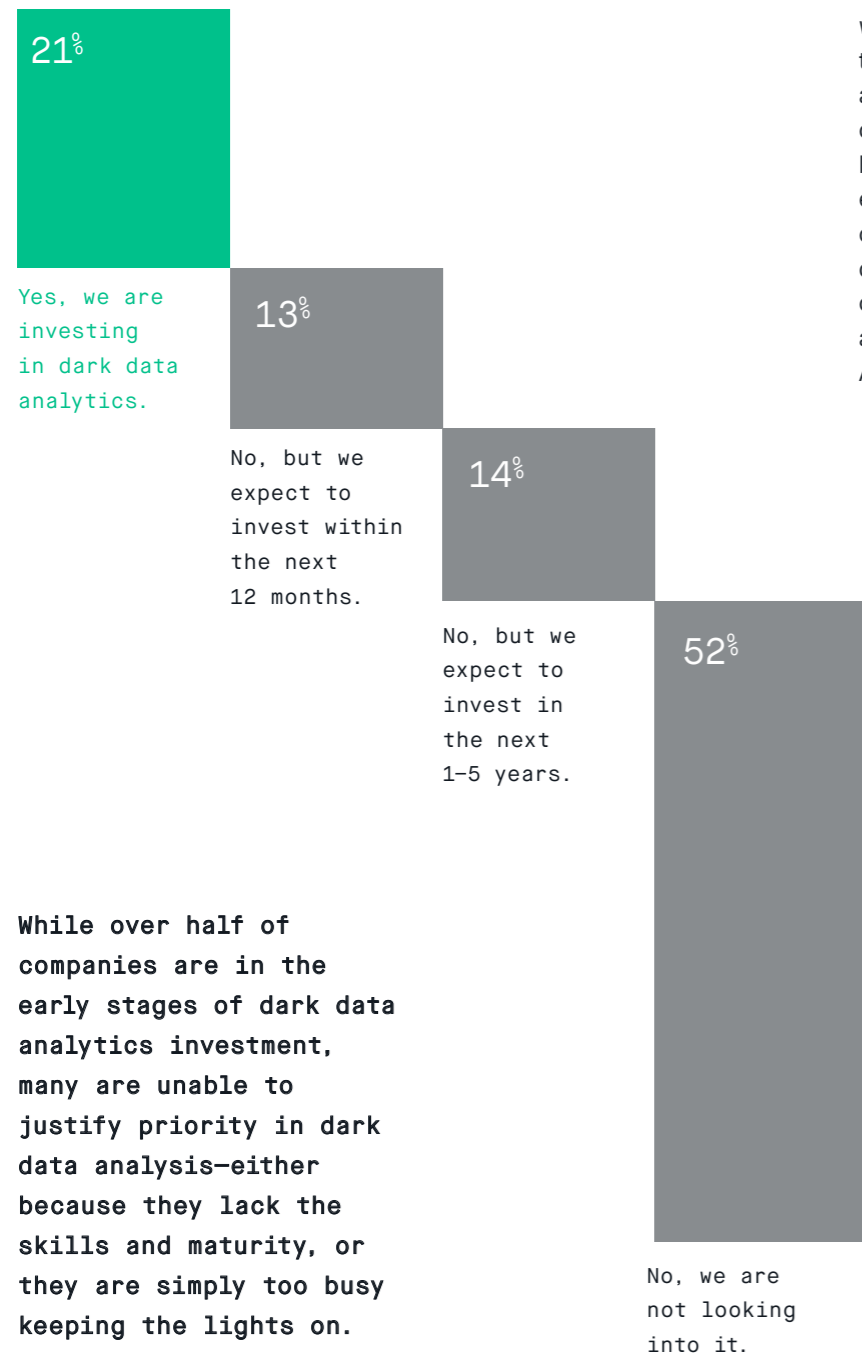
In IT We Trust

IT has a new responsibility to achieve outcomes based on what Sales cares about with some degree of balance between the two roles; otherwise, it'll revert back to business as usual. An equal percentage of organizations—33%—designate the responsibility of Salesforce to either Sales or IT. However, greater Salesforce platform maturity, in which there is continuous and

coordinated process improvement and cost optimization, is associated with more platform responsibility in the hands of IT than Sales. An organization that can sustain a predictable use of Salesforce can further advance its use of the platform by transferring a greater share of ownership to IT than Sales.

Stop Saving Data For A Rainy Day

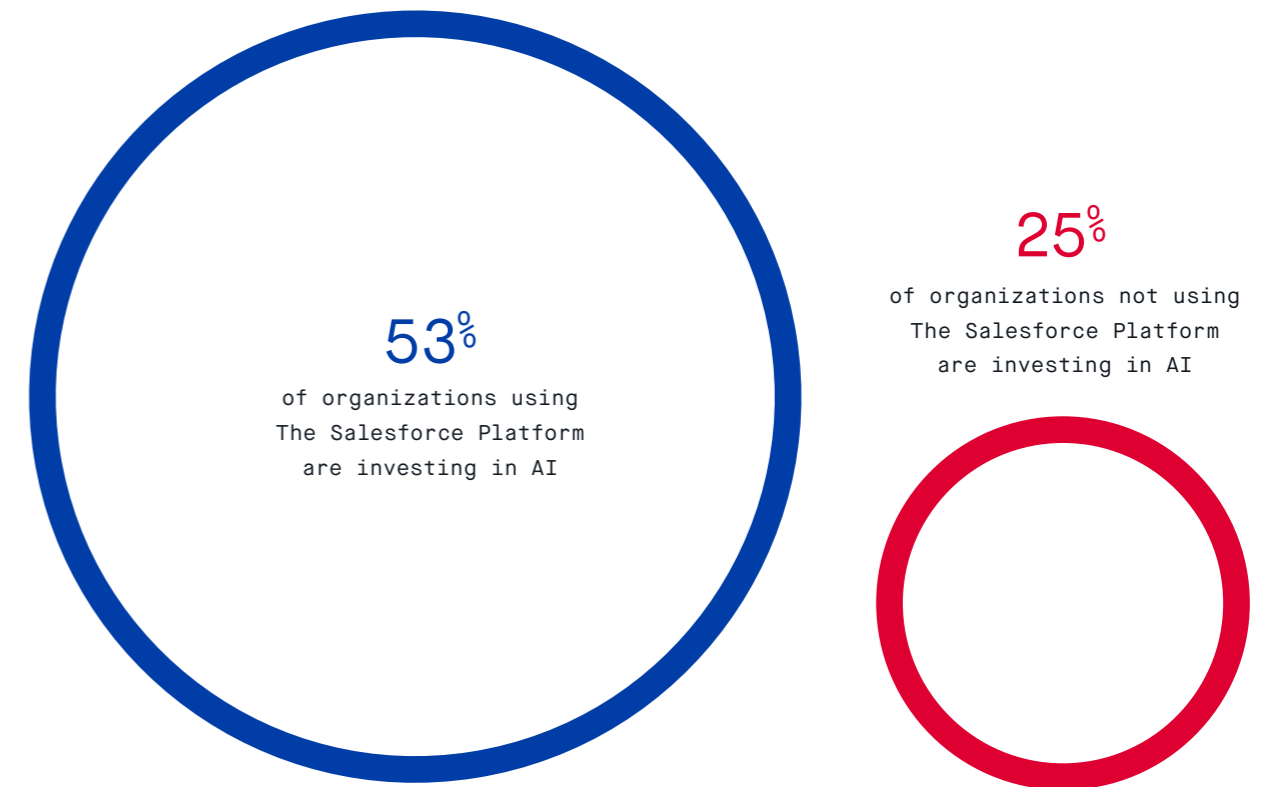
Is your organization investing in Dark Data Analytics?



While over half of companies are in the early stages of dark data analytics investment, many are unable to justify priority in dark data analysis—either because they lack the skills and maturity, or they are simply too busy keeping the lights on.

The sheer volume of data available for analysis has exploded, so it's hardly surprising that many organizations are concerned about how dark data will affect their futures. The best companies are looking to shape customer and employee experiences with dark data analysis and a more complete database for their advanced analytics. However, only one-fifth of organizations are analyzing dark data, with an additional 27% looking to invest within five years. It's human nature to hold on to things "just in case," and data is no exception. Many organizations will store data just because they don't know what else to do with it, but the best companies are taking care of their dark data as a necessary first step of their organization's journey to adopting and making the most of AI capabilities.

Organizations investing in the Salesforce Platform are over 2x more likely to also be investing in AI.



The Salesforce Platform Finds A Friend in AI

35% of IT professionals expect to purchase AI or platforms that have embedded AI capabilities within the next 12 months, with the biggest opportunity for multichannel innovation being AI. The best companies are enhancing both employee-facing and customer-facing applications with intelligence capabilities that can surface insights using Salesforce data to automate tasks, augment knowledge, and deliver more personalized experiences and timely, relevant offers to customers. Investment in the Salesforce Platform is increasing in step with AI.

Lig nng Ins ts

Li tning I si ts

L nin In hts

Li ing I gh s

Li ni igh s

htn ng I hts

Lightning Insights

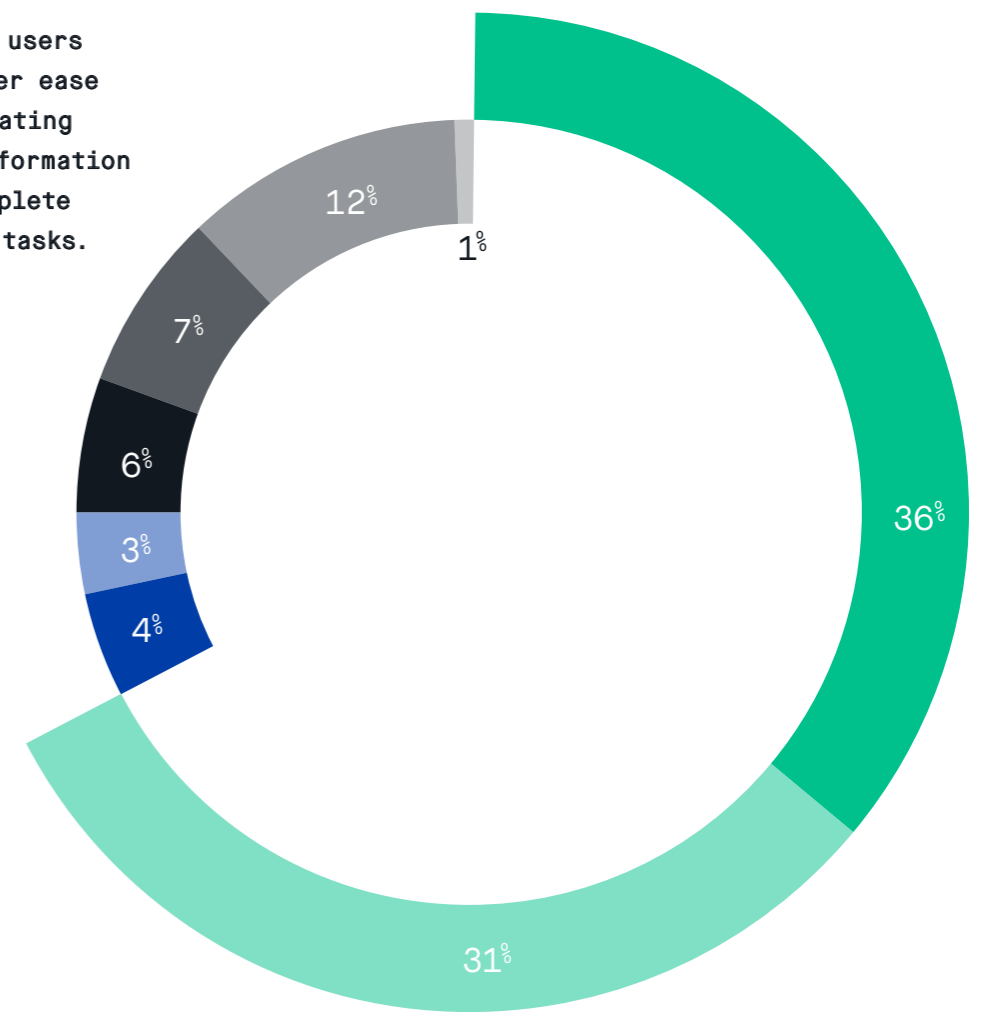


Salesforce Lightning Breeds Innovation Confidence

92% of employees believe they can use Salesforce to drive innovation in their business if their company has transitioned or plans to transition to Salesforce Lightning—compared with 76% in companies that have not or don't plan to. The best companies are prioritizing the transition from Classic to Lightning, not only for the immediate benefit to the employee experience with an enhanced UI, but also to enable the business as a whole with capabilities that support ongoing innovation. 68% of respondents report that their company's transition took less than 12 months.

67% of Lightning users experience greater ease and speed in updating and accessing information they need to complete their day-to-day tasks.

With Salesforce Lightning, which task is now easiest for you?



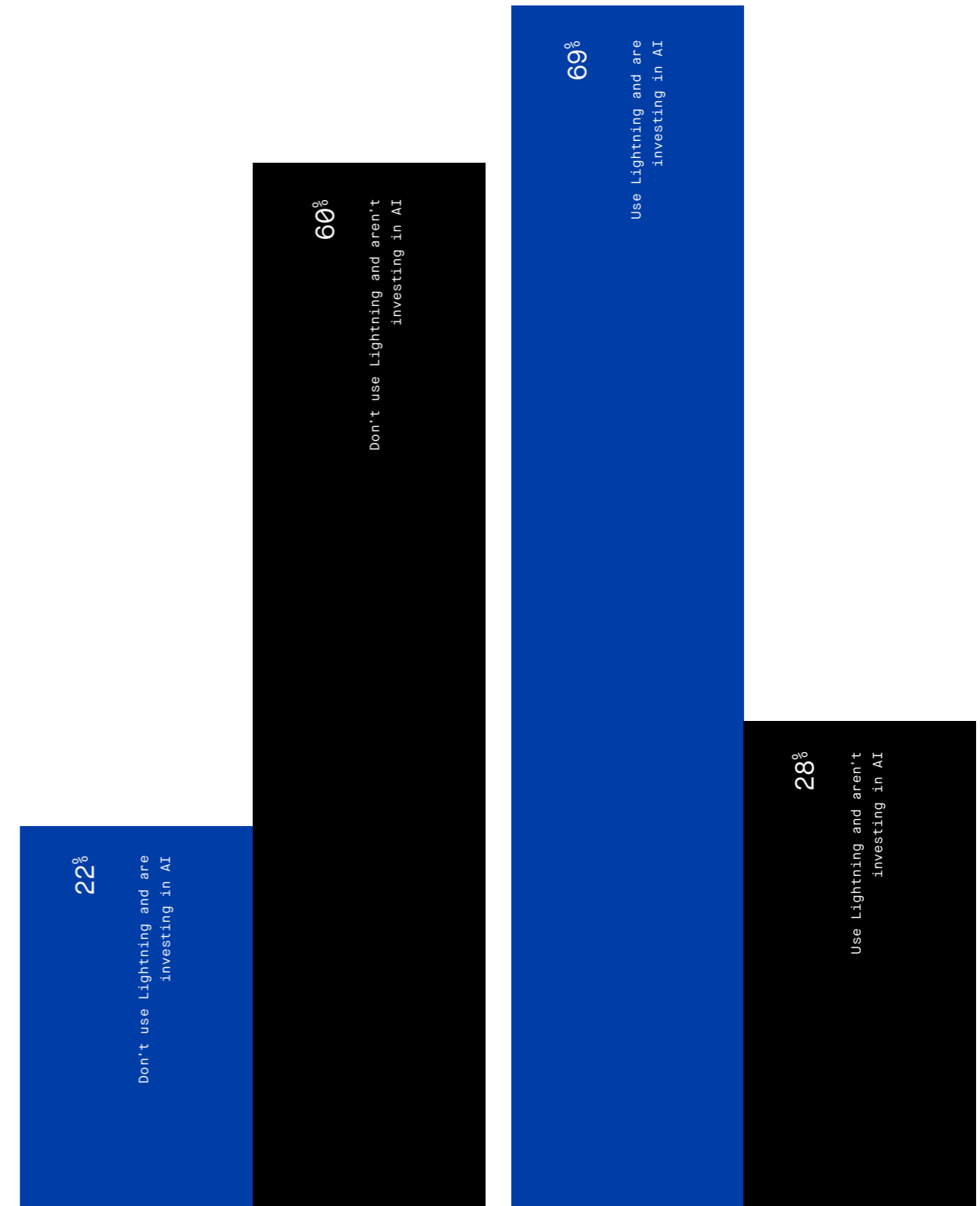
Lightning Sparks AI Investment

Organizations with Salesforce Lightning are **3x** more likely to be investing in AI within the next 12 months.

More than a refreshed UI, Lightning is the future of Salesforce and necessary for businesses to use Salesforce Einstein capabilities. 60% of organizations that have or expect to transition to Lightning within the next 12 months also plan to invest in Einstein Analytics. While moving to Lightning may not be an immediate transition for every organization, the best companies view Lightning as a long-term investment in accelerating the adoption of AI capabilities across their business.

“Never underestimate the value of the employee experience. An internal transformation defines the quality of an external one.”

Lou Fox
Chief Technology Officer
Bluewolf, an IBM Company



G a l I n h t s

G b a l I n s t s

G l I n s s

G l o l I n s i t s

G a l I n s t s

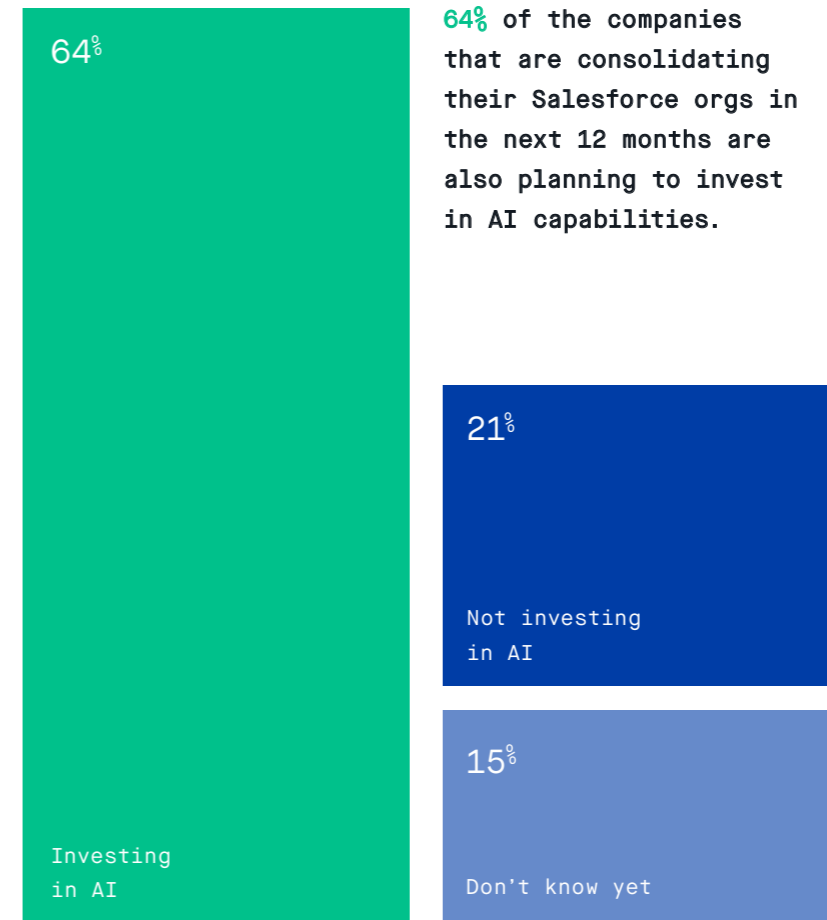
G l a l I n h s

Global Insights



Simplify Orgs To Jumpstart AI

Either through growth, M&A, or the nature of the business, it is common that organizations have multiple instances of Salesforce. Among organizations with a multi-org footprint, 60% plan to “rationalize” (consolidate) their current Salesforce orgs in the next 12 months. The rising importance of centralized data and the ability to cross-sell and service customers across multiple channels is causing organizations to reconsider their Salesforce footprint. Specifically, AI is spurring a trend toward consolidation and recentralization of CRM data, enabling valuable intelligence to be extracted from a complete set of customer data.



Why Wait? Eliminate The Cross-Border Data Risk

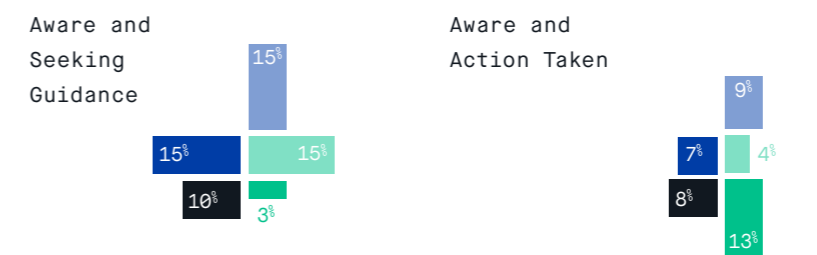
Trust is a key tenet of the Salesforce platform, but as more organizations expand their Salesforce investment across several countries, 62% are unaware of data residency mandates and without a strategy to ensure compliance. For customers who use Salesforce to store PII, sensitive, confidential, or proprietary data, they need

to ensure the privacy and confidentiality of that data to meet both regulatory and internal data compliance policies. Certain countries and regions also have specific provisions for cross-border data transfers, and all Salesforce customers should be aware of potential implications.

“We are charged with providing depth and fidelity in solutions so our clients can grow. There are subtle decisions around data residency that can help us optimize the approach.”

Glen Stoffel
General Manager, Europe
Bluewolf, an IBM Company

As the size of Salesforce data footprints continue to grow, it'll become increasingly important to ensure your orgs are secure.



The AppExchange
The AppExchange
The AppExchange
The AppExchange
The AppExchange
The AppExchange

The AppExchange

Better Together The AppExchange

More than just a place where apps can be bought and sold, the Salesforce AppExchange is at the center of an ecosystem built around the Salesforce platform. The newly established Salesforce AppExchange Partner Program and Salesforce Platform Fund accelerate the virtuous cycle of best-in-breed app development. If you don't already know what you're looking for to suit your needs, you may be overwhelmed by the more than 3,000 apps available to choose from. Exploring the AppExchange is a part of your Salesforce journey, so here are some tips for how you can take advantage of it.

Build better apps. Developers can choose among hundreds of free applications that are distributed as unmanaged packages. With full access to source code, you can modify or extend apps as needed, instead of building them from scratch. You can also augment Salesforce or create new applications with Lightning Components, using the Lightning App Builder.

Be mindful of platform compatibility. Many of the products on the AppExchange are plug-n-play or out-of-the-box, but know that set-up isn't always as straightforward if you have a highly customized Salesforce org. Understand what you're investing in, and be sure components are compatible to what you already have.

Salesforce evangelists within a company, such as administrators or IT, can look to the AppExchange for solutions that extend and reinforce company-wide platform adoption. See what products are available to improve employee experience and encourage employees to stay in the platform. The AppExchange is useful as a first step to see what could help.

ISVs and Salesforce have their own annual release schedules that present new possibilities and add new capabilities. It's helpful to have a trusted consulting partner who can identify the best-in-class solutions that are the right fit for your company's platform requirements and knows which capabilities to seek out for specific use-cases.

AppExchange Customer Choice Awards

This year, we asked Salesforce customers to name their top AppExchange partners. The top two ranking solutions represent the speed and ease that comes with digital—progressing past paper—pushing and onto seamless, automated experiences for employees and customers alike.



conga®

Conga made its AppExchange debut more than a decade ago with its document generation app, Conga Composer. Since then, Conga has become a Platinum ISV Partner and added Conga ActionGrid, Conga Novatus, and Conga Contracts to its solutions. The most recent addition, Conga Contracts is an enterprise-grade

Salesforce-native contract lifecycle management (CLM) product that is designed to work with Salesforce CPQ. With industry-recognized products and support, Conga is extending the capabilities of Salesforce for more than 615,000 users in 45+ countries.

“We’re proud of the community we’ve been able to build within the Salesforce ecosystem.”

Bob DeSantis
COO
Conga



DocuSign®

DocuSign debuted on the AppExchange in 2010 and has since become the most popular eSignature app. With a native Salesforce1 app and a solution that’s suited for all Salesforce Clouds, DocuSign is changing how business gets done by empowering over 300,000 companies and 200 million

users in 188 countries to sign, send, and manage documents anytime, anywhere, on any device, with confidence. Almost 65% of documents are completed within one hour, and over 80% within one day, driving huge time and cost savings.

We’re in the business of simplifying business for more than 300,000 companies around the world, and delivering targeted value for those who use Salesforce makes that feel exciting each and every time.

Mark Register
SVP Business Development
DocuSign

How We Created This Report With IBM Watson And Salesforce Einstein



With the announcement of the IBM-Salesforce landmark global strategic partnership comes unprecedented CRM capabilities and a new frontier of innovation opportunities with Salesforce. This year, Bluewolf combined the intelligence of IBM Watson, the leading AI platform for business, with Salesforce Einstein, AI that powers the world's #1 CRM, to develop insights for this report.

For creating The State of Salesforce, we asked Einstein to analyze specific data sets: to discover patterns based on demographic information, including region, role, company

size, and industry, and to quickly capture trends among Sales, Service, Marketing and IT respondents.

Simultaneously, IBM Watson Discovery scanned news sources, attaching a sentiment rating to the top trends we identified by using Einstein Data Discovery. These analytics enabled us to validate insights from the data.

Our sixth-annual State of Salesforce Report demonstrates a real-world use case for combining the intelligence capabilities of Watson and Einstein for data-driven decision making.

“We’re at this inflection point, where AI is able to answer customers with solutions—and how those solutions can directly impact business outcomes.”

Adam Bataran
 Managing Director
 Global Platforms
 Bluewolf, an IBM Company

Insights From Watson Discovery Services

Watson Discovery Services help gather insights from large amounts of data, like our State of Salesforce survey responses. Discovery also comes with a Watson News data set, a public data set that is pre-enriched with insights, including the percentage of documents

tagged as positive, neutral, and negative by sentiment analysis. In creating this year's report, we used Watson Discovery to validate top trends through the sentiments insights associated with them.

Augmented Intelligence

Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Negative
 Positive Negative Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Negative Positive Positive
 Positive Positive Positive Positive Positive
 Positive Negative Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Negative Positive Positive Negative
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Negative Positive Positive Negative
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Negative Positive Positive Negative
 Positive Positive Positive Negative Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive

90% Positive
 9% Negative
 1% Neutral

Innovation

Positive Positive Positive Positive Positive
 Positive Positive Negative Positive Positive
 Neutral Positive Positive Positive Negative
 Positive Negative Positive Negative Positive
 Positive Positive Positive Negative Positive
 Positive Negative Positive Positive Negative
 Positive Negative Positive Positive Positive
 Negative Positive Negative Positive Positive
 Positive Positive Positive Positive Positive
 Positive Negative Positive Negative Neutral
 Positive Positive Positive Positive Positive
 Positive Negative Positive Negative Positive
 Negative Positive Positive Positive Positive
 Positive Positive Negative Positive Negative
 Positive Positive Positive Positive Positive
 Positive Positive Negative Negative Positive
 Negative Positive Positive Negative Positive
 Positive Positive Positive Positive Positive
 Positive Positive Negative Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Negative Positive Positive Negative
 Positive Positive Positive Positive Positive
 Positive Positive Positive Negative Positive
 Positive Positive Positive Positive Positive

74% Positive
 24% Negative
 2% Neutral

Actionable Insights

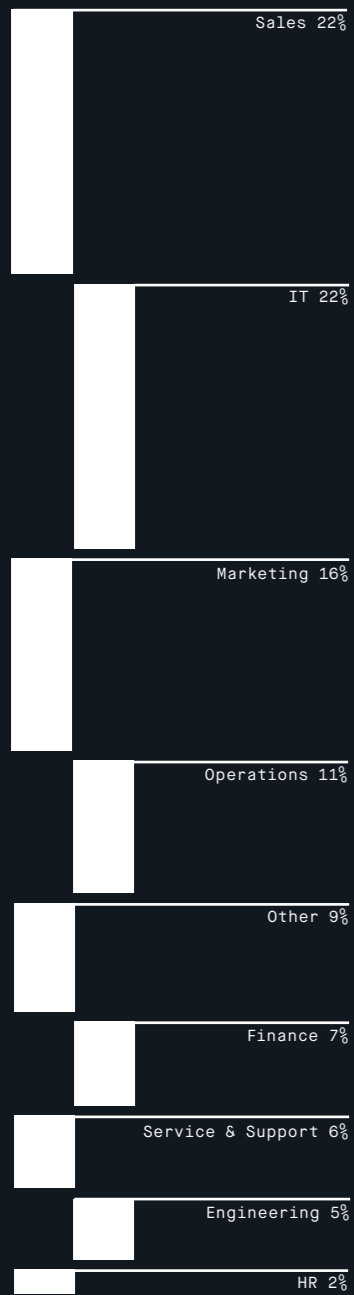
Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Negative
 Positive Negative Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Negative Positive
 Positive Positive Negative Positive Positive
 Positive Positive Positive Positive Positive
 Positive Negative Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Negative Positive
 Positive Positive Negative Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Negative Positive Positive Negative
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive
 Positive Positive Positive Positive Positive

89% Positive
 11% Negative

The State Of Salesforce By The Numbers

Bluewolf's sixth-annual report is its biggest ever, with over 140,000 data points and insights from more than 1,800 Salesforce customers. This survey was conducted May through July 2017.

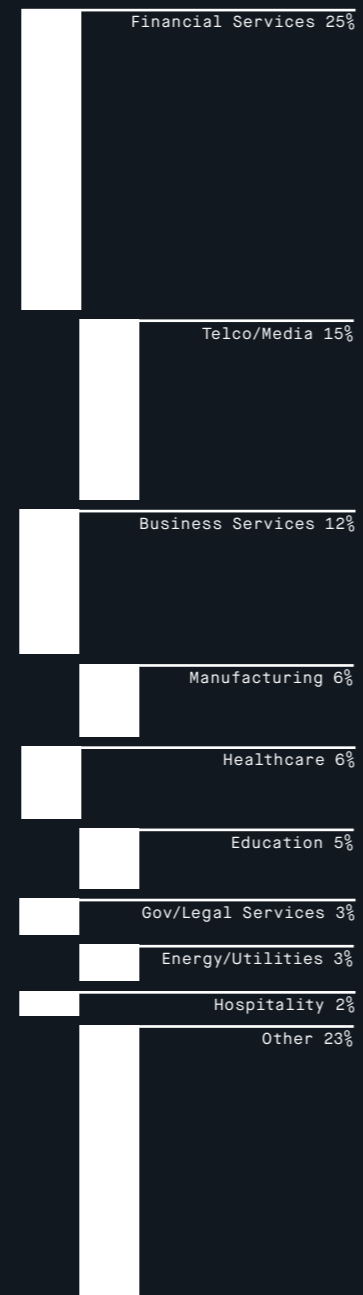
Function



Role



Industry



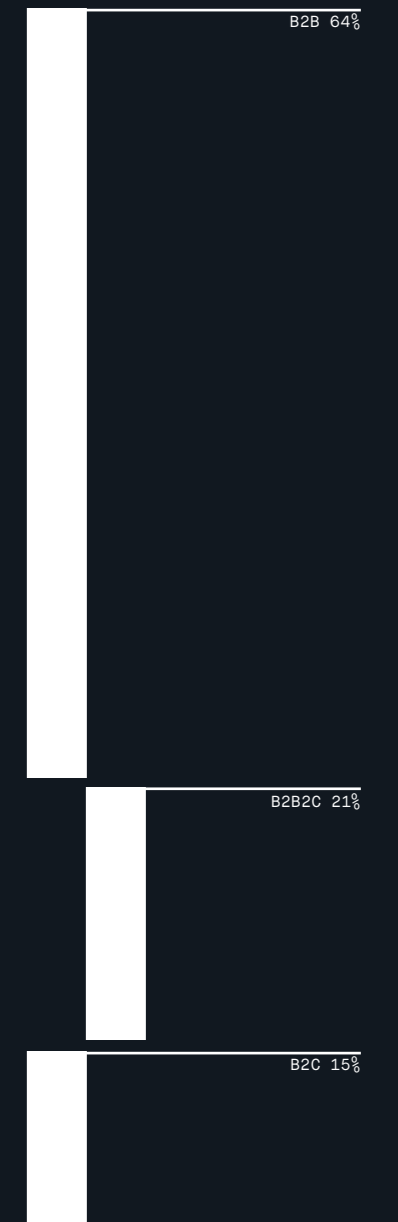
Company Size



Location



Business Model



Bluewolf, an IBM Company, is the global Salesforce consulting agency committed to creating customer and employee experiences that drive a return on innovation. We enable companies of any size and industry to deliver deeper, personalized customer moments with Augmented Intelligence (AI) as a competitive advantage—now.

Thank You

[Eric Berridge](#)
Chief Executive Officer
& Co-Founder

[Corinne Sklar](#)
Global Chief
Marketing Officer

[Glen Stoffel](#)
General Manager, Europe

[Lou Fox](#)
Chief Technology Officer

[Jolene Chan](#)
Chief of Staff

[Cindy Breshears](#)
Chief Transformation
Officer

[Adam Bataran](#)
Managing Director
Global Platforms

[Bob Furniss](#)
Service Cloud Director

[David Pier](#)
Practice Lead

[Liz Lewis](#)
GTM Lead, Marketing Cloud

[The Bluewolf](#)
Marketing Team

Salesforce, Sales Cloud, Service Cloud, Marketing Cloud, Chatter, Community Cloud, Data.com, Desk.com, Force.com, Heroku, IoT Cloud, Journey Builder, Pardot, Salesforce CPQ, Salesforce Lightning, Wave Analytics, Salesforce Einstein, and Einstein Analytics are all registered trademarks of Salesforce. Survey powered by Clicktools. Watson is a registered trademark of IBM. All trademarks are held by their respective owners.

bluewolf

an IBM Company