Your Guide to Customer-Focused Technology

How to build a technology roadmap around your customers, from vision to integration to adoption.







John Durocher

Executive Vice President, Customer Success

No matter the business leader I talk to, without a doubt, their top priority is to deliver value for their customers. And now more than ever, this value needs to be delivered consistently and it needs to be delivered FAST!

This means making your customers happy is everyone's job.

Encouraging and supporting your teams to think, act, and operate with a customer-centric approach requires alignment across your organization's processes, culture and mindsets, and of course, your technology.

In order to successfully do this, your employees need the right tools, powered by the right data. You also need to confidently put your customers front and center with a scalable solution supported by an operating model to ensure accountability across every touchpoint.

In this guide, we share how to work toward a lean, cloud-based tech stack that's focused on achieving a single view of your customers. We also reveal how improving your employee experience leads to a better customer experience. Because when your employees are more productive and effective in their work, they can deliver the connected experiences your customers want and deserve.

John Durocher

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Jair Zheng

Product Manager of Charket

With over a decade of experience with Salesforce, WeChat and how the two platforms can be combined to serve businesses better, he is an enthusiastic technology evangelist who understands how technologies can help companies improve their business processes. His team-building skills, and insights into where technologies are trending, have helped him lead our product team and build our Charket apps.

Salesforce recently released a new Technology Guidebook to help businesses of all sizes adapt customer-focused technology to unite every team around their customers. The Guidebook goes into detail as to how you can build a technology roadmap around your customers, from vision to integration to adoption.

Unlike other guidebooks, the Salesforce Technology Guidebook contains valuable insights from thousands of working sessions and projects with C-suite leaders you can use to your advantage–like learning how your organization can drive successful adoption of future innovation with the goal of working toward a single, shared view of your customer.

In order to assist you in highlighting some key takeaways for your company, we had the opportunity of getting additional insider information from Jair Zheng, Product Manager at Charket. Here's what he had to say:

How can Customer 360 from Salesforce help drive successful technology adoption and future innovation?

Thanks to Customer 360 and its underlying programming platform and APIs, we build and run our Charket app natively within Customer 360. Being the most secure and the most scalable WeChat solution, Charket helps Salesforce customers better support their WeChat customers and prevail in China.

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With all the challenges facing businesses today, why should investing in Customer 360 be a priority?

Being a social network-friendly platform, Customer 360 stands out for helping companies engage with their customers at different touchpoints throughout their purchasing journey. At Charket, we integrate WeChat with Customer 360 to help customers be more informed about what they want to buy and the options available to them.

What's the first step a business should take to create more personalized customer experiences and more satisfied employees?

When your goal is to deliver personalized experiences on WeChat, identifying who your customers are on WeChat is always the first step. Internal teams will find it convenient to use Customer 360 as a single source of truth for locating and managing customer data.

When building a technology roadmap, do you prefer to start small and power up or start big and fill gaps later?

It's a best practice to start with what's necessary and add more capabilities step by step. Charket helps Salesforce customers implement a fully functional WeChat solution natively integrated with Customer 360 within hours. Then, more WeChat features supported by Charket can be explored and implemented over time.

How are your customers responding to the outcomes of having their teams united around their customer?

They are more confident than ever before because they know their WeChat customers better through Customer 360 and can make data-driven decisions.

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Is your IT focused on products or customers?



Source: Make CRM the Foundation of Your Customer Obsessed StrategyThe fact is, technology can either hold your organization back or propel business forward. It can create more silos, or it can bridge them. And only by connecting your organization's silos can you offer customers what they want: personalized, consistent experiences across all channels.

Your employees need the right information and tools at their fingertips to respond to customer needs and design connected experiences across touchpoints. But the average enterprise uses about 900 different applications, and only 28% of those are connected. Many businesses still have a product-centric systems architecture, with CRM and other systems used tactically, department by department.

CRM is fragmented across the organization, contributing to silos.



CRM is fragmented across the organization, contributing to silos. CRM is fragmented across the organization, with a few, many, or all departments having their own CRM



Fifty-eight percent of companies say organizational silos negatively impact the quality of customer/prospect experience

A new direction: Say hello to the lean, customer-focused technology stack.

Technology generates the reach and scale you need to effectively engage with customers where they are. However, moving away from legacy technology debt and refocusing IT on innovation (versus systems maintenance) is an essential part of putting customers first. The key is to replace traditional product-centric IT architecture with a truly customer-centric approach.

Your CRM platform will play a central role. That's because an integrated CRM system that's used across departments:

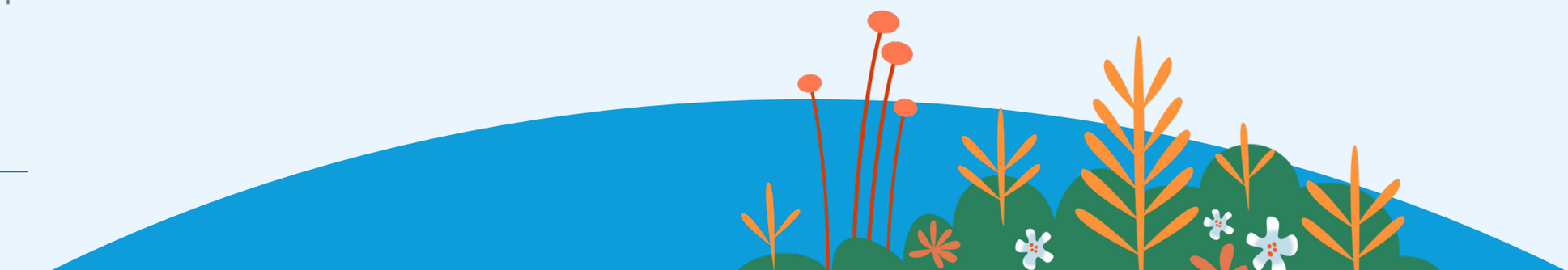
- Consolidates the number of tools needed for your workforce to do its work.
- Empowers employees closest to customers to deliver the right experiences at the right time.
- Delivers insights and recommendations, not just data.
- Makes customer data easily shareable.
- Keeps you flexible and connected in an age of APIs, IoT, and the platform economy.

Admittedly, making the transition takes some work. Customer-centered transformation is a journey spanning people, process, and IT that requires evolving legacy mindsets and bridging organization and information silos to put customers front and center.



This same goal has driven our evolution at Salesforce: to help companies break down the traditional silos that often exist between marketing, sales, commerce, service, and IT teams. We do this with Salesforce Customer 360, one integrated CRM platform that gives everyone a shared view of their customers.

Over the next four chapters, we will help you and your stakeholders build a strategic technology roadmap that puts customers at the center of your plans, provides your employees with a single, shared view of your customer, and sets the foundation for ongoing innovation across teams.



Learn two paths to building your innovation roadmap.

Create a strategic technology plan that puts customers at the center of everything you do.

Bring stakeholders together to build your innovation roadmap.

If you walk away with just one key piece of advice from this chapter, let it be this: **developing an innovation roadmap is a shared effort that should be done collaboratively across departments at the leadership level.** This is not an IT-only exercise.

Bring together a team with strategic oversight over enterprise technology, the entire customer journey or lifecycle, and business operations. Your business strategy, customer experience goals and challenges, and the employee experiences that enable them are all critical drivers and considerations for a technology plan, and require a diverse team from across the organization to consolidate into a single, cohesive vision.

With the right team in place, a pivotal step in undertaking digital transformation is building a strategic innovation roadmap or technology plan that outlines the initiatives your teams will execute over a given timeline. This includes goals, milestones, and KPIs for all relevant stakeholders, from sales and marketing to customer service and IT.



Your innovation roadmap should include the following components, and will follow one of two approaches (which we'll cover in detail in a few minutes):

- Initiatives set against a timeline.
- Short- and long-term goals.
- Resource plans.
- Key milestones like cutover and release dates.
- Release plans that can be communicated across the organization.
- Change management, adoption, and training program timelines.
- Regular status updates for key stakeholders.



Start by prioritizing the greatest customer and employee needs.

It's been shown that happy employees and customers can result in 1.8X faster revenue growth. As you start to design your innovation roadmap, prioritize initiatives around your organization's top customer and employee needs or pain points – particularly those that have the greatest impact to your business and KPIs. This ensures your efforts are grounded in the end customer experience and provide critical value.

To do so, we recommend creating journey maps for each key customer segment. To create your maps, review customer feedback and listening outputs and go on an internal listening and learning roadshow to collect the detail needed to document a typical journey for each segment. Each customer interaction with your company should be a milestone on the journey map.

But the customer experience is only half the story. You will also want to map the back-end process and employee experience enabling each milestone. It can be helpful to include the employee journey map right below the customer journey map to easily compare the front- and back-end experience across every touchpoint. Quantify the output of these interactions where possible to understand business impact and circle the areas of greatest friction.

Building your technology roadmap — two paths to success.

As you start to lay out a plan around the initiatives you need to pursue, you will need to decide how to approach an innovation roadmap based on considerations like timeline, budget, team experience, and any internal or external forces impelling action. All of these inputs will inform the way you approach a strategic plan.

Two common approaches are explained to help guide your efforts.

	Start small and power up	Start big and fill gaps later
Your Approach	Focus on simple wins as you build up to larger transformation efforts. This way, you commit to steady, continuous improvement to meet long-term goals.	Focus on large-scale efforts while supporting smaller initiatives on the edges. This is all-in transformation.
How You Win	• Motivate your team with simple wins that give them the experience to take on larger projects. • Prove it's working with minimal impact on workflow before taking on more. • You get to demonstrate value, which can help secure wider buy-in before tackling larger-scale	• Focus resources on driving maximum impact and change as quickly as possible. • Address foundational needs head-on, enabling any rapid transformation your company needs for success. • Make clear to employees, customers, and other stakeholders that the company is committed to all-in transformation.
Issues to Keep in Mind	Starting small and building momentum is a great strategy, but it comes with some considerations: • Do you have plenty of time on your runway or do you need to make foundational change happen faster? • Are you thinking as big and transformative as you need to be? Or is your roadmap focused primarily on quick wins and optimizing existing operations over creating customer value in new ways?	It's tempting to want to start big, but that can come with real challenges: • When making major changes, it can put stress on other systems – and that may impact workflow. • Be sure to build in adequate training time to limit impact to your end customers and revenue-generating operations. • Disruption can be challenging, threatening the entire roadmap and appetite for continuing on the journey. Keep focused on managing the impact of change and maintaining business continuity.



Key considerations for every technology plan.

Setting Expectations

Whichever approach you take, setting expectations is critical. It can take time to fully configure a new system or tool to meet the needs of the teams using it.

Along with clear goals and KPIs, make sure your plan outlines a timeline, including key milestones and cutover dates, that is communicated across the company to ensure alignment. Also ensure the plan accounts for regular check-ins with core stakeholders to review impact against your goals, and optimize efforts accordingly.

Resourcing

Planning for resource support during implementation is another important step that will impact your roadmap. Work with your cross-functional stakeholders to find the best answers to the following questions, and explore the implications of time, cost, and people to get the job done.

Can your organization handle the workload and change management needed to deliver your vision?

Consider how your organization funds and resources existing strategic programs. Do you have the right structure and expertise to build in-house?

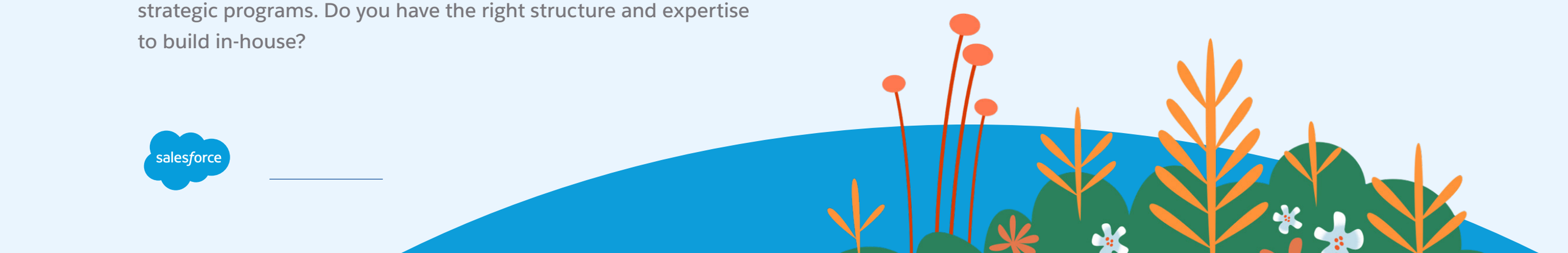
Should you collaborate with a consulting partner to implement change? A consulting partner can bring in-depth industry and technology expertise that may be invaluable to the success of a project, especially if you don't have the right resources or bandwidth to deliver in-house.

Optimization and Ongoing Innovation

Remember, this is a journey that doesn't end with a system cutover.

The needs of your business, your customers, and your employees are constantly evolving. Regular review and optimization is required to ensure a new system or tool continues to meet your needs for the long-term.

Now that you're thinking more holistically about what it takes to shift your organization further toward customer-centricity and how to build a plan to support it, you'll need to evaluate current business capabilities and the technology needed to achieve your goals.

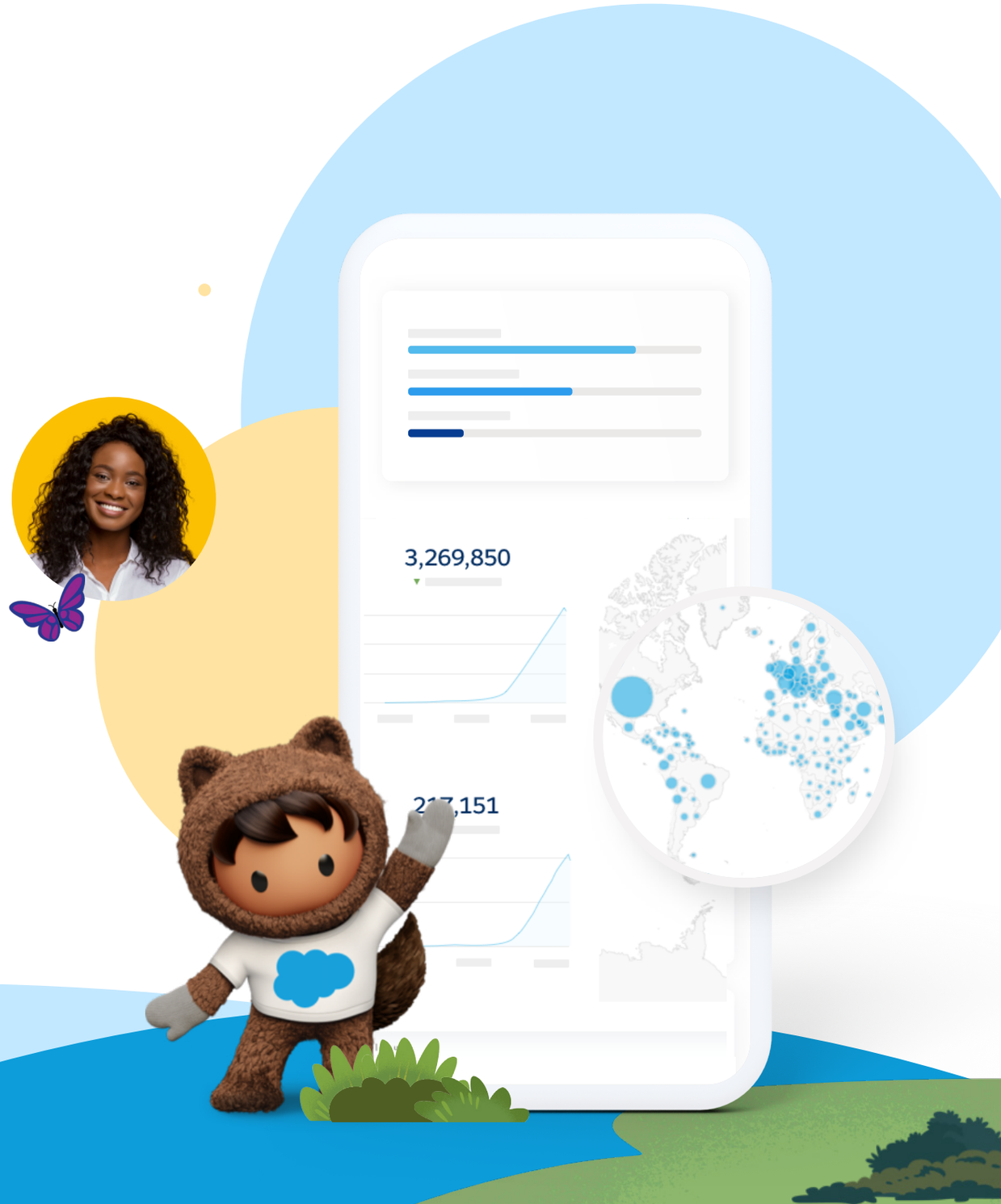


Audit Technology and Process — Where are your Gaps?

Determine where technology holds teams back from delivering on customer centricity, and how to move forward.

By this point in your transformation, you have started the process of working collaboratively with a cross-functional team of stakeholders to decide what customer and employee experiences need to change, and how.

As you build your innovation roadmap and prioritize the customer and employee experiences to optimize, you will need to audit current business capabilities and the tools each department is currently using. This will help inform where you may be able to consolidate solutions or offer alternatives to future-proof the company from point solutions that don't connect.



Map out use cases.

A critical part of this effort is identifying where current business capabilities are falling short in delivering the desired experience for your customers. By auditing process, information, and capability gaps, you can align on what technologies you may need to sunset, consolidate, integrate, or adopt to make it possible.

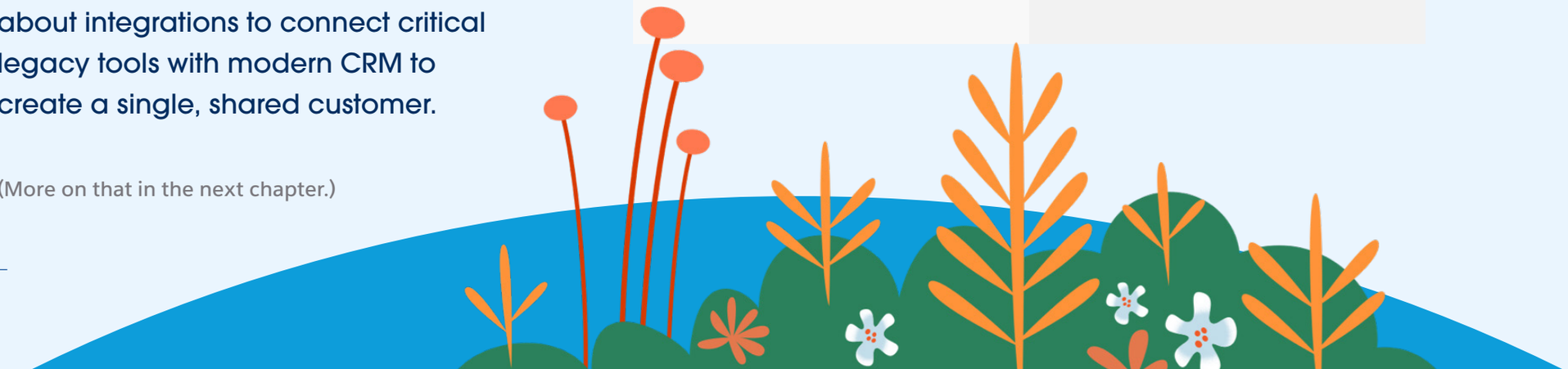
As the saying goes, start with the end in mind. We recommend mapping desired customer and employee scenarios, or use cases, and outlining the people, process, and technology required to make those experiences possible. Your current tech stack may serve some pieces of the journey, but prohibit others. Understanding these gaps will then help you identify potential solutions to incorporate into your strategic roadmap.



As part of this process, you will also want to identify business-critical legacy systems that need to be accounted for. They may not be going anywhere soon, so you need to think about integrations to connect critical legacy tools with modern CRM to create a single, shared customer.

(More on that in the next chapter.)

Common B2C Scenarios	Common B2B Scenarios
If you're a business-to-consumer (B2C) company, you may need to prioritize the following scenarios.	For business-to-business (B2B) companies, you may need to prioritize the following scenarios.
Create customer-centric journeys Need to drive customer engagement and purchases? Personalized experiences yield 4.5 times higher per-visit spend. So, you need a solution that takes your customers on personalized journeys across marketing, commerce, and service, engaging them at scale with relevant content and messaging.	**Reimagine commerce** Today's business buyers want the same experience they have as consumers. That could mean implementing or improving an online B2B commerce portal. And by empowering your customers with self-service tools, you can reallocate resources to other growth opportunities.
Engage shoppers on every channel Today's shoppers have high expectations of brands. They expect to receive personalized, relevant communications whether they're in a store, on the web, or on social media. Turning this goal into reality requires technology that connects people and systems across your business.	**Streamline opportunity management** Eighty percent of business buyers expect companies to respond to them in real time. With the right solution, your sales reps will be able to connect with customers instantly. It will enable your teams to better manage opportunities, work smarter, and grow your revenue.



Think shared, not siloed.

As you map out use cases and review capabilities, it's easy to evaluate new solutions in silos. Traditionally, departments have pursued initiatives in an ad hoc way in silos – such as modernizing sales, customer service, or existing applications, often with a variety of different solution providers. While this is the norm and can't always be avoided, it can create greater difficulties down the line. Choosing different solutions or platforms for each team means you'll spend a lot more time integrating and maintaining data in the pursuit of more connected customer experiences.

Tip: Put a process in place to ensure IT is involved in all technology decisions before new solutions are purchased so they can assess ease of integration with other tools. IT should have a bird's-eye view of technology across the organization and should support systems governance.



As discussed earlier in this guide, it's not uncommon for CRM decisions to be made tactically, department by department. That approach no longer needs to be the case as the right CRM system can be a powerful solution that actually helps to bridge silos – enabling all your teams to build and manage customer relationships across every phase of their journey with your brand. Think about the potential benefits of having your sales, marketing, commerce, and service teams using the same system and accessing the information they need from the same dataset.

See the value of a connected CRM in action here.



A shared view of the customer will empower all your employees to respond faster to customers' needs and engagement opportunities. It will enable you to implement a holistic, customer-centric roadmap and provide truly connected experiences for customers.

Customer Priority #1: Optimize the customer experience across digital commerce, marketing, and customer service.



Commerce

Provide consumers and business buyers alike with a fast, smart, mobile-first digital commerce experience. Deliver relevancy to its customers and increase conversion through AI-driven product recommendations, predictive sort, and search dictionaries.



Marketing

Engage customers with at-home campaigns and exclusive discounts through email and the MVP loyalty program.



Service

Make customer service a cornerstone of a seamless customer experience. Using data coming from Commerce Cloud, service agents can pre-populate carts during real-time conversations from Service Cloud. This comes in handy when a customer's basketball hoop is broken and they need to order a custom kit of replacement parts.

Customer Priority #2: Build advocacy and drive conversion from loyal customers.



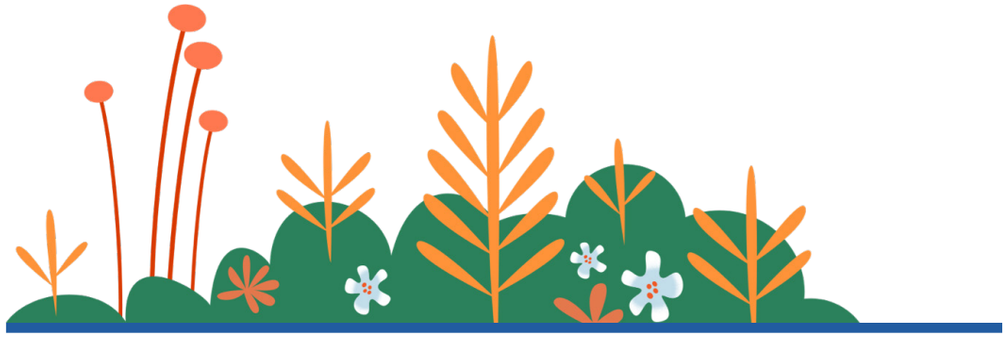
Commerce

The Spalding MVP loyalty program engages customers with first access to new, limited-edition basketball drops.



Sales

Spalding's B2B sales team has a single place to manage all customer interactions with arenas, sports teams, and other customer organizations – to continue to grow these relationships.



"We're not aiming to have a best-in-class experience in sporting goods. We're aiming for a best-in-class digital experience, period."



Matt Day

Head of Brand Communications, Digital, and E-Commerce, Spalding

Work Toward a Single View of Your Customer

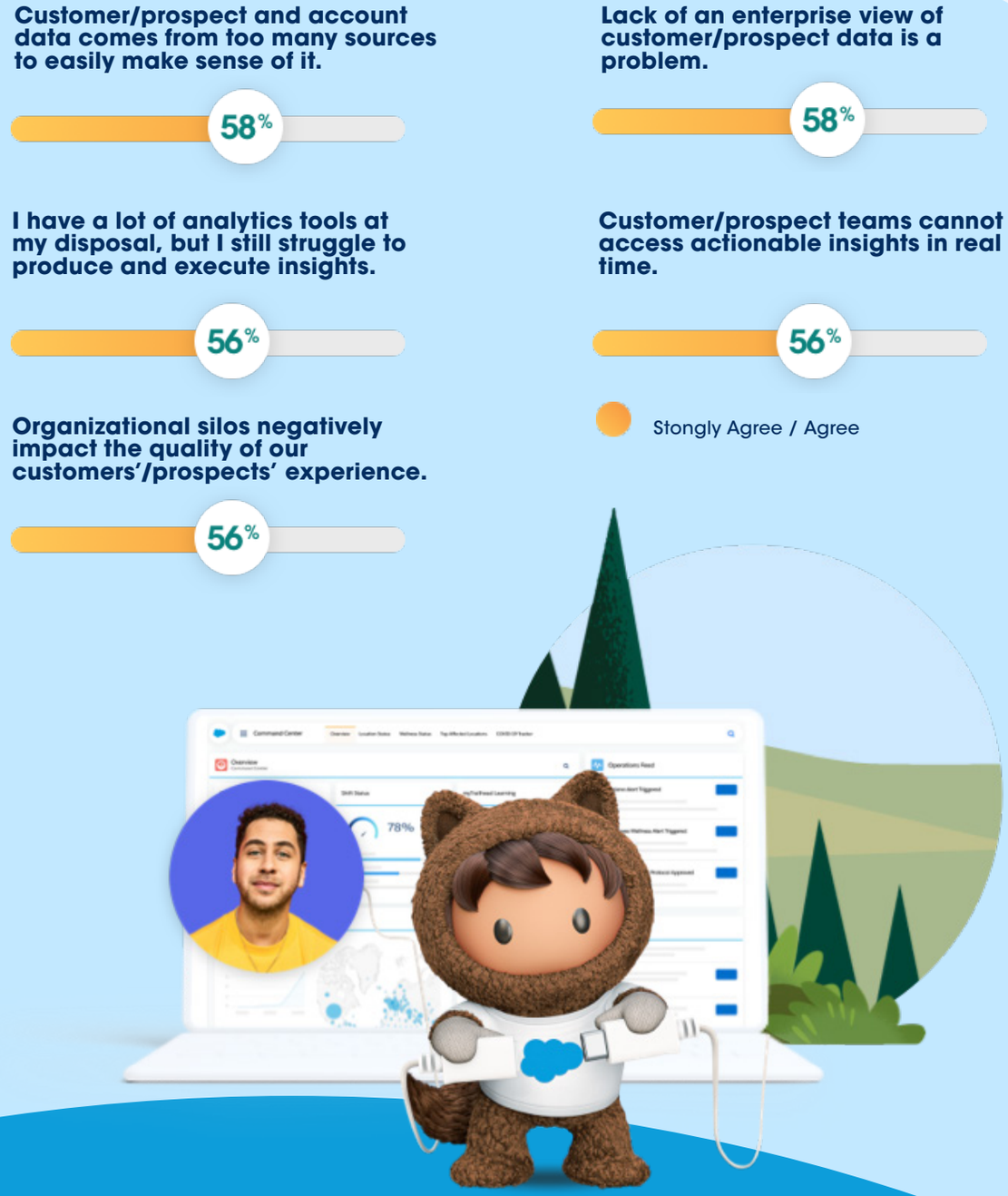
The integration opportunity is knocking.

We've all had the experience of reaching out to customer service, only to be shuffled across multiple departments that all ask us for the same information. All too often, customers have to navigate a company's org chart to get the answers they need – mainly because employees don't have easy access to a single source of truth for customer data.

The fact is, customer data comes from too many sources to easily consolidate and make sense of it all, and silos only exacerbate these challenges. This, in turn, negatively impacts the quality of customer and potential customer experiences.

FORRESTER®

Source: Make CRM the Foundation of Your Customer Obsessed Strategy



salesforce

As we mentioned in an earlier chapter, the average enterprise uses about 900 different applications and only about 28% of those apps are connected. This is a big problem because nine out of 10 IT leaders say data silos are their greatest obstacle to digital transformation.

Companies need a single source of customer truth.



To what extent do you feel your CRM system(s) provide(s) a single source of truth today?

Completely



How much value would your organization gain from a single source of truth for customer data?

Significant value

Indispensable value

FORRESTER

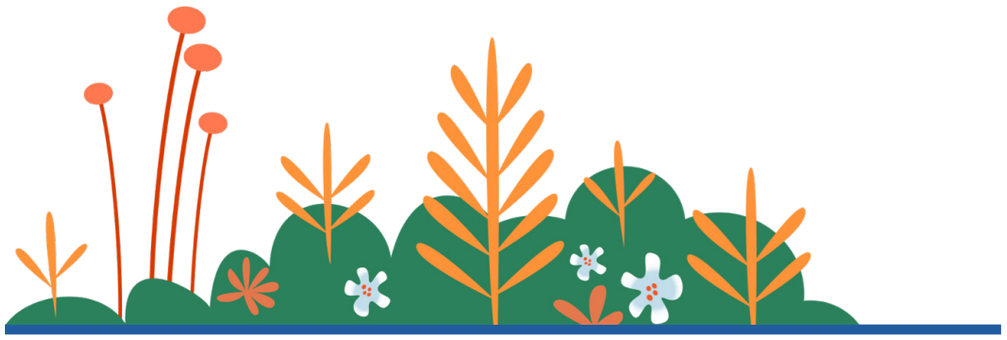
Source: Make CRM the Foundation of Your Customer Obsessed Strategy

The integration opportunity is massive. Research shows well-integrated CRM systems contribute to significantly higher customer satisfaction. Eighty percent of well-integrated businesses reported an eight or higher on a 10-point scale when rating their overall experience for customers, as compared with 57% of organizations whose technologies were not well-integrated with their CRM platform.

Decide what and how to integrate.

To provide a connected experience, data may need to be integrated between a broad range of business applications, systems of record, and external sources.

Again, taking a use case approach can help you decide what systems and data need to be integrated. If, for example, you want to provide personalized product recommendations for customers via email newsletter, product data from your ecommerce platform will need to be accessible from your email marketing engine. And you will likely want to automate processes, such as sharing pricing information between your enterprise resource planning (ERP), CRM, and ecommerce systems.



Then, you need to decide how to integrate the systems. This can happen in multiple ways:

1. Organizations can invest solely in products and services from one provider, so all programs and tools more seamlessly integrate and share data.
2. Developers can write custom code to force two systems to communicate with each other.
3. Developers can use application programming interfaces (APIs) to allow an application to securely connect to and use data from another application.

Each approach has its pros and cons. For example, while it may be tempting to choose best-of-breed applications from different vendors, writing custom integration code often results in a messy web of code that breaks with updates and new integrations. On the other hand, an integrated all-in-one solution may not have the capabilities some lines of business need.

Alternatively, you can take a hybrid approach by adopting a customer-centric platform like Salesforce Customer 360, which offers market-leading applications for key lines of business, all built on a shared platform – but can also be highly connected and integrated with other software through APIs and data management tools. More to come on that in a minute.

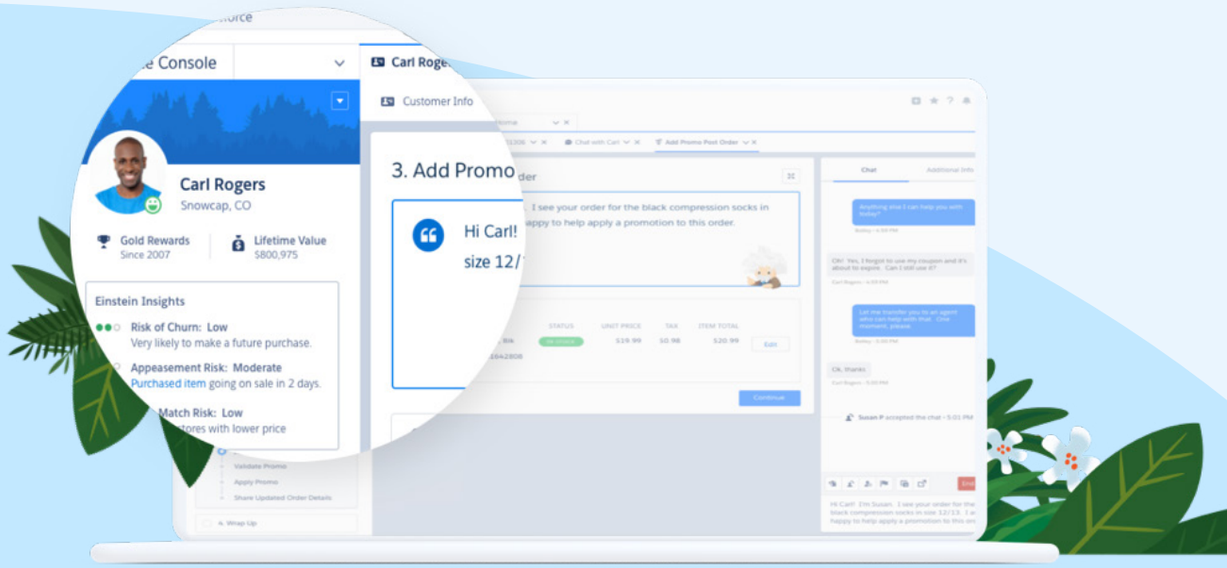
Empower your employees with a single source of truth for every customer.

The ultimate aim of data integration projects is to create a single source of truth so everyone across the organization can access the information they need from the same dataset. The big question, of course, is how. Salesforce can help you achieve this with Customer 360 Data Manager and MuleSoft.

1 **Salesforce Customer 360 Data Manager** offers a point-and-click interface that allows your teams to connect all your Salesforce apps and customer data from other sources to create a single global ID and profile for every customer across the organization.

2 **The MuleSoft Anypoint Platform** provides a bridge between Customer 360 and the rest of your organization's ecosystem of systems and data. It allows your developers to use APIs to connect Salesforce with on-premises, cloud, and legacy systems. For example, it can unlock back office data from ERP systems and databases in Salesforce apps to synchronize orders and automate workflows. APIs are designed to make integration much easier and quicker for developers. In fact, 60% of IT leaders say that integration with APIs is critical to their digital transformation strategy.

Together, Salesforce Customer 360 and MuleSoft, a Salesforce company, allow you to surface your company's data to deliver intelligent, connected experiences across channels and touchpoints.



Access thousands of pre-integrated apps.

Trusted Salesforce partners have created thousands of apps that integrate seamlessly and securely with Customer 360, and can all be found in the AppExchange. This ecosystem of more than 5,000 solutions and 80,000 peer reviews can help you solve any business challenge and extend the power of the platform.

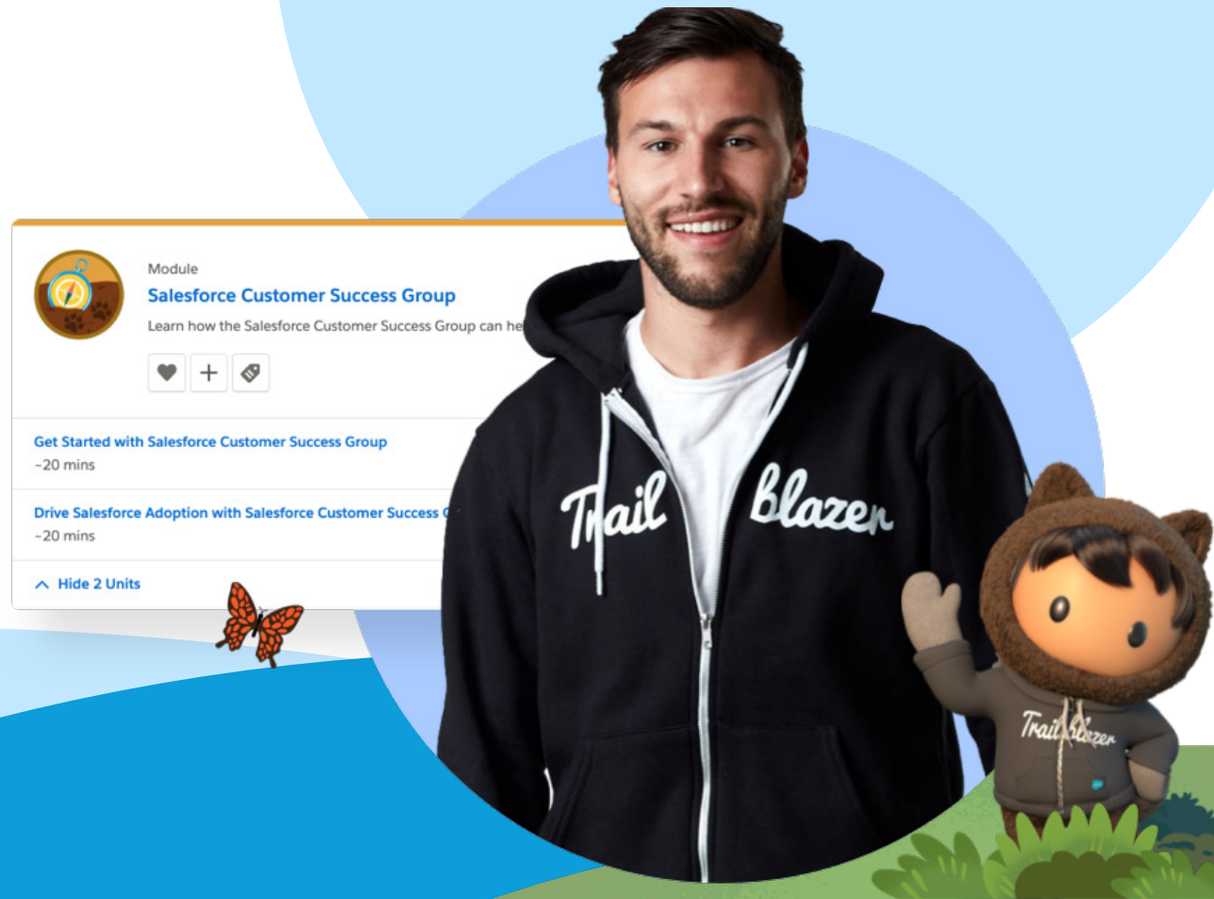
Getting the right technology platform and solutions in place is vital, but that won't guarantee success until you have your people onboard. The next step is to drive the adoption of new apps and tools through change management and training.

Drive Successful Technology Adoption and Future Innovation

Learn how to foster a culture and community of changemakers with the right change management.

People, process, and technology are three critical components of any successful transformation. While it's easy to get hyperfocused on the technology as you rush ahead to meet roadmap milestones, your customer-centric technology investment will fall short or even fail entirely if you don't prioritize helping your people through technology and process changes.

This includes implementing an organizational change management program that trains employees in new technology and minimizes challenges as they acclimate to new ways of working. But it also should prepare them for a future where change is the norm and innovation is an everyday part of doing business.



Does your culture support meaningful change management?

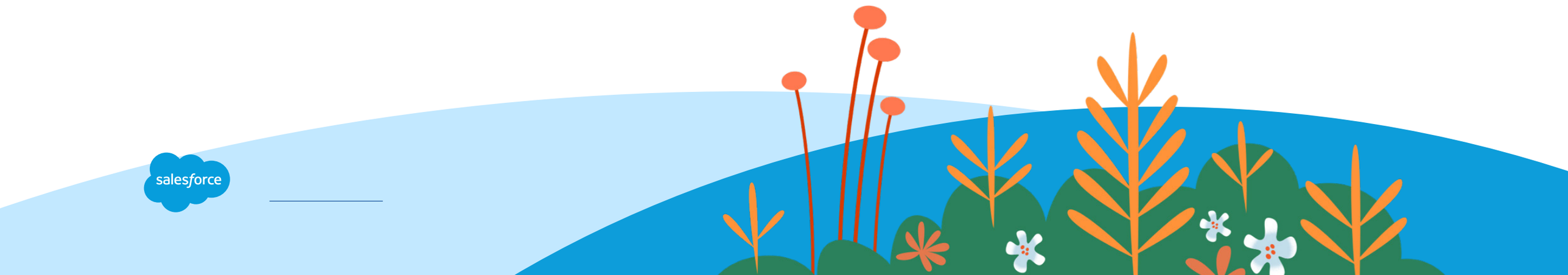
Adapting to new ways of working can be hard and everyone approaches change differently. It's important to have a change strategy that sets your people up for success while minimizing challenges as they acclimate to new ways of working. But cultural norms can be barriers to meaningful change. For example, if employees don't feel they belong to a culture of innovation, or if they lack clear transparency around the goals and vision, the move to new tools and ways of working may feel like less of an opportunity and more of a chore.

More than a third (36%) of executives say there's too much resistance to cultural change among employees. Who is to blame? The fact is, company culture and established mindsets start at the top. It's crucial that executives champion a culture that supports innovation, transparency, inclusion, and communication, and a common vision everyone can rally around.



Success depends on constant communication and complete alignment. We've been able to achieve both with the help of a management process I developed a number of years ago called the V2MOM, which stands for: Vision, Values, Methods, Obstacles, and Measures."

Marc Benioff, CEO, Salesforce



A change management program is a critical piece of your strategic technology plan. Here's a few tips to help guide your team's efforts:

1 Articulate a vision of what the organization is trying to achieve, how it aims to get there, and how management will support employees through the change.

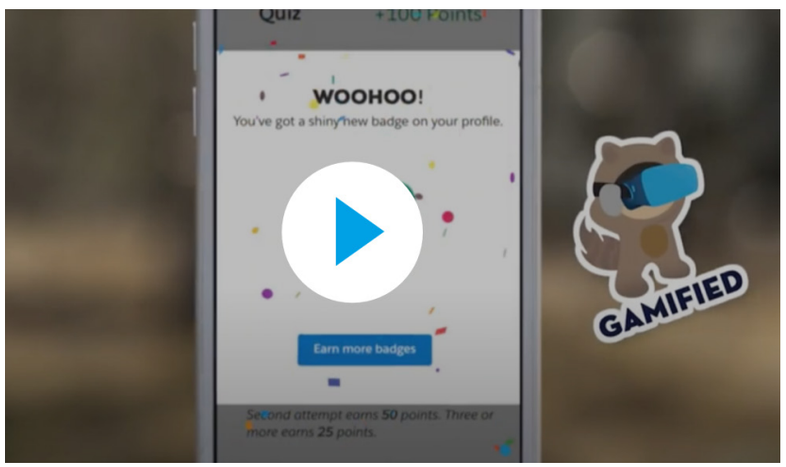
2 To help design the program, it's important to get feedback from leaders and conduct employee surveys to learn about the failures and successes of previous change events. That can also help you manage resistance to change.

3 Good change management is embedded into a program from the beginning through the end. To do this right, regular communication is critical before, during, and after the change event. Your messages must be empathetic and specific to everyone affected by the change, from the board and the executive team to employees and customers.

Help your people skill up for the future of work.

Training is essential both when introducing any new technology and in an ongoing capacity to keep your team up to speed on the latest skills. Your training program should be designed for each role and line of business. It should explain how each new system or tool will affect users' daily work and show them how to use it to become more productive and effective.

Trailhead provides ready-made training courses for our apps and tools, as well as general strategies and techniques such as design thinking. And as part of Customer 360, we offer myTrailhead to help you create custom learning programs from your own content and branding to help employees with everything from onboarding to company-specific enablement skills and career progression.



But training shouldn't begin and end with a new solution cutover. Continuous learning and ongoing support and feedback should be embedded in your technology roadmap. For example, you can use employee feedback to optimize your roadmap and help your organization continue to innovate.

How to learn more.

The CRM system has come a long way. Who would have thought 20 years ago that tools designed primarily for sales force automation and database marketing would become vital to the entire business? Eighty-percent of companies are now increasingly using their CRM system as the single source of truth about their customers across all departments and touchpoints.

You can go further by turning your CRM into the business-critical, customer-focused backbone of your enterprise technology stack.

In summary, you can do this by:

- Creating a strategic technology roadmap that prioritizes employee and customer needs.
- Auditing where current technology and process are holding you back and using real-world business scenarios to help select the best solutions for your organization.
- Creating a single source of truth by integrating systems and data.
- Driving innovation and the adoption of new apps and tools with continuous learning.

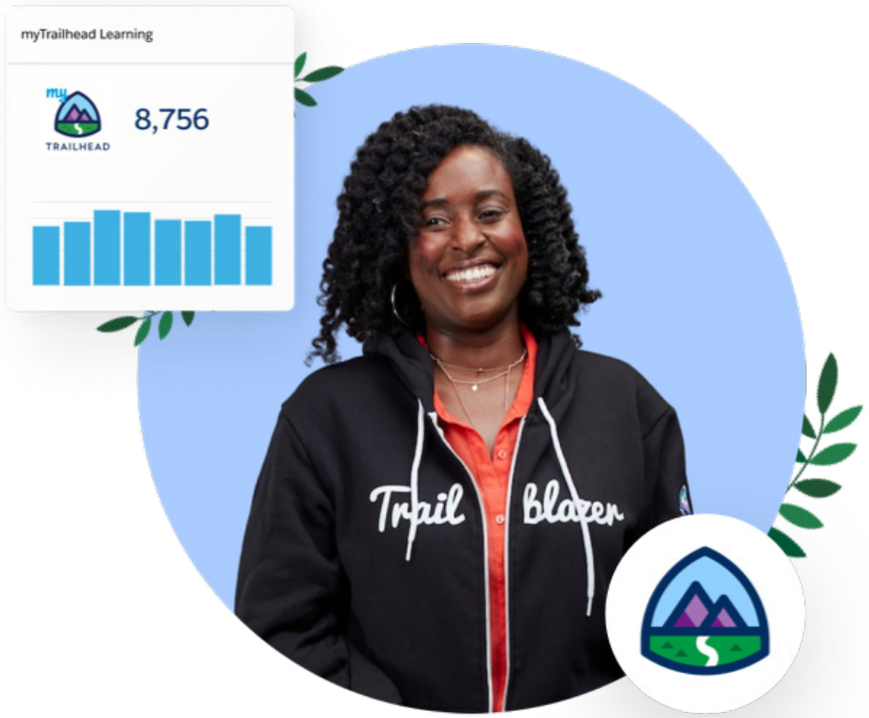
Salesforce has led the evolution of CRM, for most part due to the ever-growing needs of our customers. And Salesforce Customer 360 is the culmination of our evolution so far: an integrated CRM platform that provides powerful solutions for marketing, sales, commerce, service, IT, and more.

Plus, it's a highly extensible, API-driven platform for connecting your systems and data, so all of your employees can provide the connected, personalized experiences customers expect.



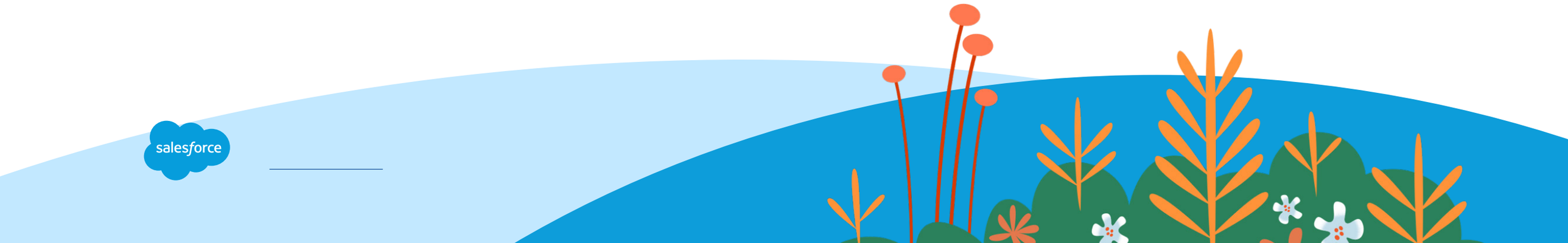
We're with you every step of the way.

Learn from our network of 3.5M+ Trailblazers to network, share ideas, and find answers as you progress on your digital transformation journey.





Customer success has been at the heart of everything we do since day one. Our Customer Success Group is baked right into Customer 360 and built off of 20+ years of learnings and best practices. **We provide access to the world's leading Salesforce experts, 24/7 technical support, one-on-one coaching and guidance, and a rich Partner Ecosystem.** No matter where you are on your journey, we have the right resource to help you move seamlessly from vision to value.



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