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PERSONALIZING THE USER EXPERIENCE IN SALESFORCE USING AI TECHNOLOGIES

Kaliuta K. Personalizing the user experience in Salesforce using AI technologies. Artificial intelligence (AI) technology has transformed the interactive marketing experience of clients. Despite a large number of studies investigating the use of AI in interactive marketing, customization as a significant concept remains unexplored in marketing using AI research and practice. authors investigate appropriate research as well as insights on Salesforce interactive advertising. The authors highlight practice challenges at various points of the customer experience and give critical managerial advice as a solution to such problems. Personalization may help your business in a variety of ways. For starters, it may enhance customer loyalty and engagement by making consumers feel appreciated and understood. Second, it may aid your company's revenue growth by encouraging clients to make more purchases based on personalized suggestions. Third, it can boost retention rates of clients by increasing trust and decreasing the possibility that consumers would migrate to a rival. Fourth, it may enhance overall consumer satisfaction through rendering it more easy, efficient, and pleasurable. Your company is well-positioned to provide uniquely customised experience to customers at scale by embracing AI-powered customization technology. AI can aid in the discovery of important consumer data, the generation of forecasts about consumer habits and preferences, and the optimization of content and product suggestions. One can guarantee that AI-driven personalisation is successful and satisfies your customers' expectations by doing so.

Keywords: User experience, Customer journey, Salesforce, Artifical Intelligence, CRM.

Introduction. Personalization is the process through which a corporation customizes a customer's experience to their specific preferences, habits, and needs. It is critical for organizations because it enhances client happiness and loyalty, which leads to increased revenue. By providing individualized experiences, your company may gain consumer confidence and establish long-term, mutually beneficial connections (Gao & Liu, 2022).

Today the most organizations regarding the matter are keen on knowing it all, at some random time and progressively about each client taken independently: his temperament, perspective, goals, where he is (working, at home, voyaging…)? What is he doing (driving, paying attention to music, working out…)? What gadget or channel is he utilizing (portable, web, associated watch)? Yet additionally a progression of data viewing the setting like the climate, encompassing sound level or lighting, also obviously his utilization history as a customer for the brand. In any case, brands are additionally very much aware that this journey for data has its cutoff points as well. Utilizing individual information likewise implies a gamble of security encroachment (Riveiro & Thill, 2021).

Different examinations show that the customer is very much aware of the organizations' advantage in getting this individual data and that, generally, he is reluctant to share the most reasonable information, yet in addition that he is fairly able to share a specific sum under the accompanying essential circumstances (Chen et al., 2020):

• full straightforwardness from the brand with respect to its expectations;

• control and the board of his inclinations concerning sharing the data he has been unequivocally endowed with;

• if there is a quantifiable thought for such sharing.

The client's assumptions as far as client experience personalization are progressively high. He needs (Chen et al., 2020):

• Proactivity: the organization should expect his requirements by focusing on for instance, certain functionalities and certain substance or by exhorting him so he can arrive at his objective all the more rapidly. For example, Delta Carriers portable application - in the event of a crossing out or a failed to catch associating plane, permits you to promptly enlist again on the following accessible flight;

• Importance: the organization needs to dispose of the « surrounding commotion » of unessential solicitations. For instance, a site for vehicle spare parts will naturally show parts and frill that are viable with the client's vehicle image, model and year;

• Congruity: the point is to offer omni-channel encounters and smooth cycle from a channel to another (web, versatile, tablet PC…);

A.   Personalization in salesforce

SFA systems were originally employed in the 1980s and have since become increasingly common in business-to-business settings, where they are considered as a "competitive necessity" that fosters "competitive parity." SFA is defined and distinguished by the application of information technology to assist the sales function. The SFA eco-system is made up of hardware, software, and service companies. SFA software businesses are classified into several subcategories(Sunkari, 2022).

Some suppliers are experts in SFA. They compete with enterprise suite suppliers that offer a wide range of IT solutions to businesses, such as logistics management, company resource planning, and customer relationship management, as well as CRM suite companies who incorporate SFA modules (Hu & Zhang, 2020).

SFA has several advantages, according to vendors and consultants, including better financing, reduced sales cycles resulting in faster inventory turnover and relationships with customers, higher earnings, more precise tracking, and enhanced a salesperson productivity, rise in sales, share of the market, win costs, cost-of-sales, and closing greater possibilities and profitability (Hu & Zhang, 2020).

SFA software businesses are classified into several subcategories. Some suppliers specialize in SFA. Their competitors include manufacturers of customer relationship management (CRM) suites, which integrate SFA elements into packages that perform across the three frontoffice departments of marketing, service, and sales. SFA offers a means for salespeople and management to gather, store, analyze, and distribute customer-related data. Customers' transaction and profiling data are often included, However, market statistics, competitive profiles, products libraries, price schedules, and other information may also be included (Sunkari, 2022).

Today, more people are at ease with businesses using important personal information in a transparent and useful manner. 61% of survey respondents acknowledged a degree of comfort with these tailored user experience strategies in the 2022 the Salesforce company State of the Connected Customer research. This is an increase from 52% the previous year. However, there is no clear understanding of what constitutes transparency and benefit (Hughes, 2023).

Personalization is a critical component in providing exceptional client experiences. Customer want to be recognized as humans, and they can sense this when they are viewed as generic characters.

The findings of the State of the Connected Customer Report, containing insights from 13,000+ consumers and over 4,000 corporate buyers globally, illustrate what a firm may lose if it does not offer a personalized customer experience (Hughes, 2023).

More than half of clients (56%), anticipate personalized offerings. Companies that do not personalize their experiences to the demands of each individual risk losing clients entirely. Customers' loyalty should not be taken for accepted, with 71% of customers switching brands more than once in the previous year. Personalised interaction should also include how and when a company engages with a consumer — and they want a unified, fast, multichannel, real-time experience (SalesForce, 2022).

B.   How to create good customer experiences

Customers always want a constant positive purchasing experience as well as the greatest possible value. If they don't want to buy pricey razor blades, they may sign up for low-cost monthly delivery.

Technological advancements have caused upheaval in every industry. Customers now have more options and greater freedom to transfer their business somewhere if they do not receive the service they expect. Indeed, 71% of customers changed companies at least one time during the previous year (SalesForce, 2019).

According to 78% of customers in Salesforce's State of Marketing survey, regular communications from one department to the next are critical to creating outstanding experiences. Personalization must be consistent across every department and platforms, online as well as offline. Although it may appear to be a difficult endeavor, the use of artificial intelligence has already helped marketers in tackling customization at scale (SalesForce, 2019). Marketers all around the world are already getting on board with AI, with 79% now using it or expecting to use it over the next two years. According to Salesforce, AI will expand 257% in the next two years. AI is clearly becoming a new tool in the marketing toolkit (SalesForce, 2019).

Methodology. Sufficient literature was necessary to provide a good foundation for this approach. The literature was in the form of journal papers, books, and scientific pieces on the internet. Among the sources are IEEE, Springer, , and Towards Data Science (Medium).

Due to the lack of established standards and a lack of consensus on terminologies conducting a cross-disciplinary review through adjacent fields, such as the one presented, makes it difficult to methodically

retrieve and identify relevant scientific works. These difficulties are eased by using the scoping review technique to collect data across a wide range of disciplines and research designs. Furthermore, scoping studies may be used to demonstrate the volume and breadth of research activity within a topic, determining the worth of doing a subsequent systematic assessment that can identify research gaps and indicate future paths.

Result and discussion. People often talk about artificial intelligence in lofty, complicated terms, such as self-driving automobiles or talking robots. However, AI is cheaper than you may believe, and it has several applications which make sense for your advertising strategy.

Marketers may use AI to conduct a wide range of customization activities, such as actual time next better offers, prediction journeys, enhanced segmentation of customers, and more. And you don't have to go directly into large-scale, difficult implementation. You may build up simple AI tasks that have been shown to yield ROI.

Marketers Are Experimenting with AI in an Assortment of Ways
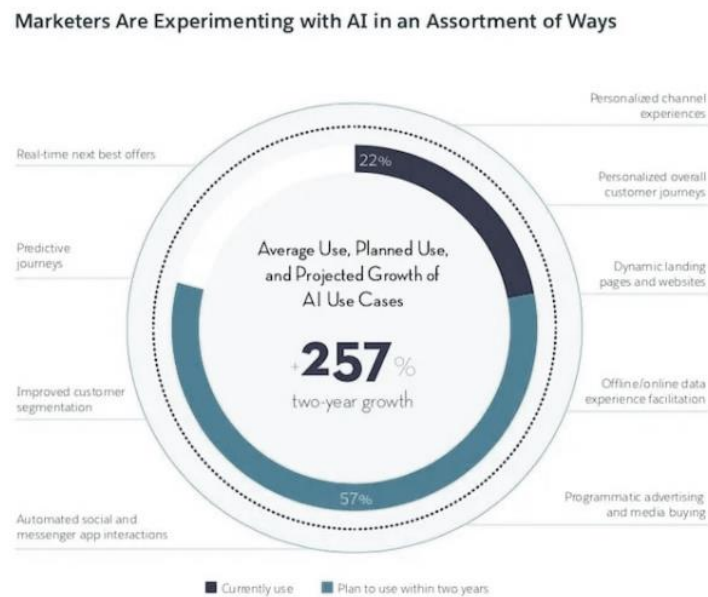
AI, for example, may assist you in taking the optimization of your landing pages to an additional level. Without AI, you might conduct a basic A/B test on the landing page to see which page performs better. The better-performing headline might then be made the new norm.

When AI is added to the mix, though, you can offer up more dynamic, tailored content to each unique user. Instead of simple A/B testing, AI may provide a tailored answer to every single visitor on your site, based on customer data. When clients visit your website, they will be able to see what is most essential to them as individuals. No more guessing contests - AI will give what your consumers are seeking, making the road to buy easier than before.

The Marketing Cloud is an online advertising solution of salesforce that allows you to better understand your customers, customise their experiences, and engage people across many channels. Here are three immediate ways to leverage Marketing Cloud to provide customized services at scale.

C.   Personalization across channels should be automated for more seamless journeys.

Automation can help you develop and execute customised experiences for your whole audience. You may, for example, customize content across emails, landing sites, SMS messages, and push messages by creating emails that render information on a subscriber-by-subscriber basis. The final result is a smooth, tailored experience for each of your consumers with no more work on your part.

Marketing automation system can modify your data extension from the landing pages as it pulls data for each tailored message, making future encounters even more personalised for that consumer based on their involvement, user actions, or information they offer.Let AI inform your decision-making. AI has the ability to assist your marketing team in improving segmentation, optimizing send times, and personalizing product suggestions. AI-powered advanced personalisation can also boost your ABM (Account-Based Marketing) approach. You may use AI to find new prospects and track them throughout the sales process, offer tailored adverts and interactions with customers, and provide deep data analysis that your marketing and sales personnel can utilize to enhance customer experiences (Saifi, 2021).

D.   Provide your marketers with the tools they need to simplify dynamic content.

Dynamic material is a valuable tool to have in your marketing arsenal. Your marketing team can quickly drag and drop custom content blocks or widget into messages for real-time personalisation by designing dynamic content block or widgets.

Assume you were employed by a retail business that specialized in camping supplies and gear, and one of your latest email campaigns targeted year-round outdoor fans. Your developers may use dynamic content to construct a bespoke content blocks that presents real-time weather information in a subscriber's geographic location and then sends them to season content or items based on tailored suggestions (SalesForce, 2019a).

E.   Salesforce uses generative AI in its marketing efforts and purchasing experiences.

Salesforce Inc. announced today the introduction of two new generative artificial intelligence products, Marketing GPT and Commerce GPT.

The former is intended to assist marketers in creating individualized emails and smarter marketing journeys, whilst the latter is intended to assist businesses in creating more personalized purchasing experiences and customized suggestions.

Salesforce introduced the new products as it expanded its strategic alliance with Google Cloud including a pair of fresh connectors geared to help businesses harness AI. The objective is to gain a better knowledge of their consumers' behavior, to give tailored experiences, and to execute more successful marketing efforts. Salesforce has been aggressively pushing generative AI this year, in hopes of capitalizing on one of technology's biggest trends. Salesforce CEO Marc Benioff stated last week that the business plans to lead the next significant transformation in CRM by incorporating generative AI into almost all of its apps and services, and the company has spent no time in making good on that promise (de Jong et al., 2021).

1)   Marketing GPT

According to Salesforce, the new Marketing GPT service is going to be able to assist advertisers with a variety of tasks due to a slew of skills it will provide. For example, using natural language prompting and AI-powered recommendations, its Segment Creation tool, which will be available in test this summer, will assist advertisers in swiftly creating audience groups and improving targeting.

Email Content Creation, which will be released in beta in October, will allow customers to auto-generate customised emails in order to boost customer engagement. To provide a more comprehensive perspective of audience engagement, Segment Insight for Data Cloud will seamlessly combine first-party data, revenue data, and third-party paid advertising data. Fast Identification Resolutions, Segment and Participation, that automatically recognizes consumers and updates groups in Salesforce Data Cloud, and Typeface, that can be used to generate relevant visual assets for marketing campaigns, are other features inside Marketing GPT (van der Doelen, 2022).

Personalization based on predictive analytics. Salesforce's Marketing Cloud Personalization gathers detailed information about each customer and uses artificial intelligence to offer personalized, cross-channel experiences at each stage in your customers' journey. Their online behavior will be tracked by first-party cookies, within the app, and email. By identity-stitching data from numerous data sources, Marketing Cloud Personalization can identify the subsequent action for each consumer and adapt messages on various platforms accordingly in real-time.

When a consumer browses the 'day cream' category, the Marketing Cloud's Personalization evaluates the user's affinity with this group of products. The technology may personalize the website by modifying the home page banners and suggestions by integrating an individual's user behavior with the information of other customers. If a customer leaves the site without making a purchase but has high conversion intent, there are several ways to contact out to them, including sending AI-powered emails (van der Doelen, 2022).

2)   Commerce GPT

Commerce With Goals Driven Commerce, a new platform that allows organizations to define targets and goals and then create relevant data and suggestions on how to reach them, GPT will assist to automate growth. Dynamic description systems will help businesses by automatically populating lacking catalog data with auto-generated descriptions of goods suited to unique purchasers. Finally, Business Concierge will enable individualized dialogues with customers and assist them in discovering new items using natural language interactions via digital marketplaces and messaging apps.Although much of the focus will undoubtedly be on Salesforce's new content generating capabilities, the audience segmentation feature is likely to have the biggest positive impact on marketers (Ghoshal, 2023).

3) Google Cloud integrations

Salesforce is also making a difference in other sectors because to its collaboration with Google Cloud. It has resulted to a pair of new connections that will allow businesses to combine their data with bespoke AI models to better forecast client demands while lowering the cost, risk, and complexity of data synchronization between platforms.

The first collaboration between Salesforce Data Cloud and Google BigQuery will enable businesses to develop unified profiles of their consumers by combining data from many platforms and clouds, and then provide highly tailored experiences based on those profiles. Companies will be able access consumer data from one place, eliminating the need to first extract, convert, and load the data (Wiggers, 2023).
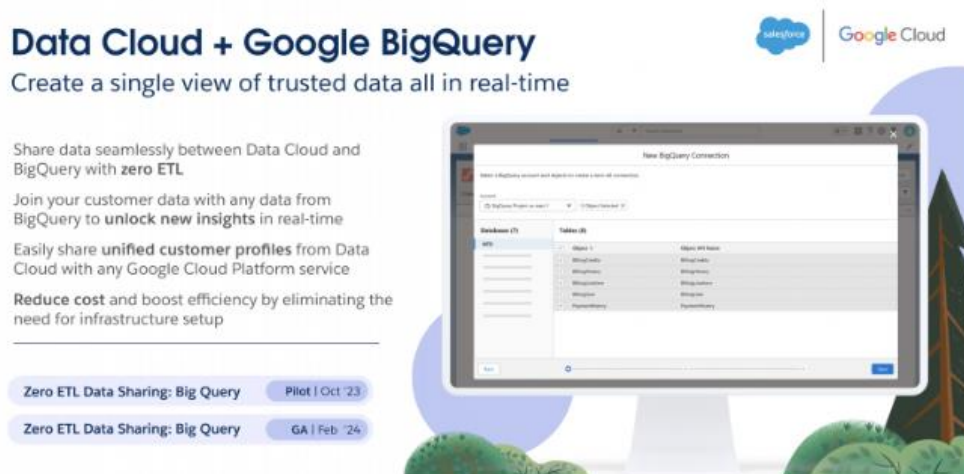

Figure 1: Data Cloud with google integration in salesforce (SalesForce, 2022)

Meanwhile, the Salesforce Data Cloud and Google Vertex AI interface allows users to construct customized AI models in Vertex AI and utilize them throughout Salesforce's CRM platform without having to move data. According to Salesforce, this streamlines the process of establishing and training models to forecast buyer behavior, customer attrition, and other factors (Wiggers, 2023).
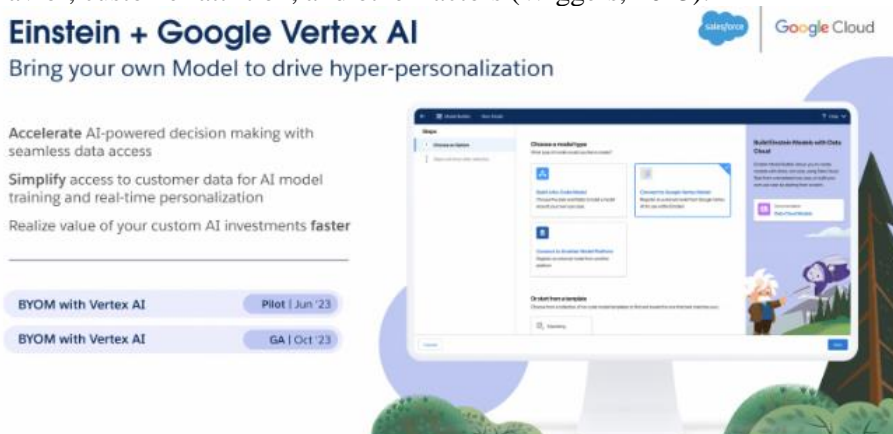

Figure 2: Einstein and google cloud integration (SalesForce, 2022)

Salesforce claims that the two connectors will allow a fashion store to combine CRM data like a customer's purchase history and interactions with service with non-CRM data like social media sentiments and real-time online activity. analyzing that mix of data, they will be able to install specialized AI models that can estimate their chances of purchasing specific sorts of clothes. They may then use this to provide customised suggestions to that consumer (SuperCloud3, 2023).

On the other hand, a healthcare provider can link CRM data like appointments history and patient feedback to non-CRM data like patient demographics to train models that forecast which individuals are at risk of readmission. They can then develop individualized treatment strategies for their most vulnerable patients.

Conclusion and future research. Salesforce's power to be a game changer for your company in a variety of ways. Salesforce has transformed the way corporate operations are optimized, whether in sales management or marketing. The essence of a CRM, though, is the customer experience, and Salesforce has considerably more to offer in this regard. Businesses can now improve their customer experiences and deliver them tailored content like never before thanks to the Salesforce Commerce Cloud. The technological stack must change in tandem with the customer landscape. If marketers want to provide really meaningful experiences, they must not only incorporate personalisation but also guarantee that the methods they use meet industry standards of excellence.

Future study might look at how much the importance of personlization varies depending on the B2B setting. This might be accomplished through a series of case studies. Furthermore, the study we conducted just looked at the marketing components; future research might look at the processes of co-creating benefit between customers and providers in the case of personalization, as suggested by the fundamental characteristic.

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