

Framework 16.0 Solution Conformance

Salesforce solution for omni-channel service in Communications

Self-Assessment Process Mapping Report

Customer Experience Management (1.3.2)

Version 1.0

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Salesforce is applying for Conformance Certification for its leading industry solution on omni-channel service.

This report maps Business Process Framework processes that can be supported by supporting products from Salesforce.

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1 1.3.2 Customer Experience Management

1.1 1.3.2.1 Customer Experience Maturity Assessment

LEVEL 3 PROCESS MAPPING DETAILS	
1.3.2.1 Customer Experience Maturity Assessment	
Brief Description	
	This a specific process of the General Maturity Assessment processes that are in Common Enterprise Processes in the Enterprise domain. AM
Extended description	
	The Customer Experience Maturity Assessment process is a specific process of the General Maturity Assessment processes that are in Common Enterprise Processes in the Enterprise domain. It defines the customer maturity matrix, analyze Key Capability Indicators, and determine customer maturity level for each dimension. AM
Salesforce Conformance Description	
	A CSP can leverage the following data sources/ capabilities to build a custom CEM Maturity Model based on Salesforce capabilities:
	<ol style="list-style-type: none">1. Data stored in Salesforce2. External Data Sources that captures information related to customer experience3. Leverage the metadata model that provides programmatic access to the configuration and source of application [REF1.3.2-06]
	Additional diagrams were provided to TMF as a part of detailed submission.

1.2 1.3.2.4 Mapping and Analysis of Experience Lifecycles

1.2.1 1.3.2.4.1 Select Journey

LEVEL 4 PROCESS MAPPING DETAILS
1.3.2.4.1 Select Journey
<p>Brief Description</p> <p>Selecting and mapping important journey(s) AM</p> <p>Extended description</p> <p>Select Journey processes involve mapping important journeys that are relevant to a particular customer experience objective in order to analyze and improve the customer experience. AM</p> <p>Salesforce Conformance Description</p> <p>A CSP can use Journey Builder [REF1.3.2-01] within Marketing Cloud application to design a journey (communication plan) that reaches customers at every stage of their journey with the CSP. Entry events for journeys can be based on customer activity in Service Cloud (such as changes to case record), enabling the CSP respond to a single view of a customer.</p> <p>Salesforce has recently introduced AI processes within the Customer Journey capabilities, such as predictive scoring, that use data science to help understand how their subscribers are engaging with email and the Web, and predict future engagement behavior.</p> <p>Analysis of the customer journeys can be done through Service Cloud and/or Marketing Cloud Reports. [REF1.3.2-02] discusses standard reports that are available from Marketing Cloud.</p>

1.2.2 1.3.2.4.2 Record Journey

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.2.4.2 Record Journey	
Brief Description	Collecting the metrics and observations for a journey. A
Extended description	Record Journey process involves collecting the metrics and observations for a journey. The collection methods may include surveys, mystery shopping, automated data collection, etc. A
Salesforce Conformance Description	<p>Marketing Cloud can be setup (through Synchronized Data Sources, (REF1.3.2-04)) to access and collect data from Service Cloud to initiate new activities in a journey. The collected data is actionable - ready to be used to segment messaging lists, provide highly personalized messaging content and drive 1:1 Customer Journeys, as specified in [REF1.3.2-03].</p> <p>Krux¹ can also be leveraged to collect and store non-PII data from web pages, mobile devices apps, and manages a single identity of a customer across multiple devices.</p>

¹ <http://www.krux.com/>. Since this is a fairly new acquisition, we are not able to provide too many technical details on the integration.

1.2.3 1.3.2.4.3 Analyze Journey

LEVEL 4 PROCESS MAPPING DETAILS	
1.3.2.4.3 Analyze Journey	
Brief Description	Analyzing Customer Experience Journeys through various methods. AM
Extended description	Analyze Journey processes involves analyzing selected customer experience journeys through journey analysis to recommend improvements to customer experience AM
Salesforce Conformance Description	Marketing Cloud provides many standard reports that can help a CSP track the effectiveness of its campaigns and communications with its customers [REF1.3.2-05]. A CSP can also use Wave Analytics to analyze customer journeys and visualize the data through dashboards. Additional diagrams were provided to TMF as a part of detailed submission.

1.2.4 1.3.2.4.4 Measure Customer Experience Improvements

LEVEL 4 PROCESS MAPPING DETAILS
1.3.2.4.4 Measure Customer Experience Improvements
Brief Description Measure the success of the customer experience recommendations through comparing it with various success criteria AM
Extended description Measure Customer Experience Improvements process involves measuring the success of the customer experience recommendations through comparing it with various success criteria such as against metrics benchmarks. AM
Salesforce Conformance Description Salesforce’s Ideas Community provides an online, transparent way for a CSP to attract, manage, and showcase innovation. This needn’t be just restricted to employees within the CSP organization, but can also include public users and partners as well. [REF1.3.2-07] provides details on how to prepare, setup and administer Salesforce for Ideas Community. Salesforce includes a real-time, robust reporting and analytics engine, designed to allow users to easily create the reports they need for deep analysis of all Salesforce data.

2 Salesforce Products

Salesforce products referenced in this Document:

1. Salesforce Service Cloud
2. Salesforce Marketing Cloud
3. Salesforce Analytics Cloud

3 Supporting Evidence References (Works Cited)

[REF1.3.2-01]	Marketing Cloud Documentation – Journey Builder
[REF1.3.2-02]	Marketing Cloud Documentation - Reports
[REF1.3.2-03]	Marketing Cloud Documentation – Web and Mobile Analytics
[REF1.3.2-04]	Marketing Cloud Documentation – Synchronized Data Source
[REF1.3.2-05]	Marketing Cloud Documentation – Get Started with Reports
[REF1.3.2-06]	Technical Library – Introduction to Metadata
[REF1.3.2-07]	Winter Release 17: Ideas Implementation Guide