

salesforce

The Manufacturer's Guide

Translate Data Into Intelligent Insights and Actions



A Data-Centric Future

Data gathered from manufacturing enterprises across the globe shows that the [manufacturing industry is evolving](#). Increased customer expectations have given way to more robust, personalized digital sales and service journeys. Built to anticipate, improve, and extend customer experience over time, these journeys are the road map for the future – an end-to-end customer lifecycle that yields deeper, more regular customer connections and more resilient, predictable revenues.

But that all starts with the ability to manage data and translate it into functional insights and actions. To fuel the lifecycle and keep pace with modern expectations, your team needs to know who your customers are, what they need, and when they need it.

In this guide, we'll explore why your data is so important to your business and how to make it actionable – taking advantage of innovations in AI, automation, and analytics. These factors work together to help you make faster, better decisions, execute your processes more efficiently, and deliver the experiences your customers expect. This lays the foundation for you to get the most out of key areas of your business, including:



Sales and Operations

Manage your complete book of business, align sales and operations planning (S&OP) with accurate demand forecasting, and accelerate product-to-cash. Learn more in [The Manufacturer's Guide to Modernizing Commercial Operations](#).



Service

Reimagine omni-channel service, optimized from your contact center to your service operations to your field techs, shifting the profile from a cost center to an asset-centric profit center. Learn more in [The Manufacturer's Guide to Transforming the Service Experience](#).



Channel Partner Relationships

Drive greater channel partner visibility, self-service engagement and performance, and “ease of doing business” with dealers. Learn more in [Simplify Partner Engagement: A Guide for Manufacturers](#).





The Data Volume Challenge

The average company uses [991 applications to track and store data](#). That's data pertaining to products, customers, assets, web and mobile engagement, machine learning, and more – all living in separate enterprise resource planning (ERP) systems, external [data lakes](#), and warehouses. Furthermore, according to [Deloitte](#), “Manufacturing is estimated to generate about 1,812 petabytes of data every year.” That's roughly 900 trillion pages of standard printed text. From the factory floor to logistics networks, the volume of data running through manufacturing makes it “the most data-prolific industry there is,” according to [Forbes](#). And as modern manufacturing ecosystems expand, so does that data volume.

So how do you manage all that data? That's the challenge. Manufacturers have to grapple with a maze of legacy systems – disparate point solutions that often don't integrate or interact with each other. As manufacturers inherit the data and systems of new acquisitions, the complexity multiplies. Many manufacturers have more than 30 ERPs alone, never mind their other systems. And the investment in external, third-party data lakes continues to grow.

Meanwhile, sales, marketing, service, operations, finance, analytics, and other teams need to access all the data housed in those systems to provide informed insights that support greater productivity and success. But without a single shared source of truth, they simply can't do that. Let's say an Internet of Things (IoT)-enabled printer flags a needed repair. For a lot of manufacturers, such an alert is stored in third-party IoT data lakes. There's a notification that the printer is failing but without a front-end integration, no service case is created, no work order is generated, and no technician is dispatched – or at a minimum, the process takes much longer than it should with each action being a separate, manual motion.

It's the same for channel partners. A shortage of data visibility powers a pattern of reactionary decision-making rather than a collaborative, engaged partnership. The result? Revenue leakage on warranty claims, loss of rebate program revenue, and other issues.

There's no debating it – your business's future relies on a one-stop interface that compiles data from current and legacy systems, enabling every team to communicate and collaborate from the same reference point.

In fact, [Mulesoft's Connectivity Benchmark report](#) found that 81% of IT leaders say data silos are hindering their digital transformation efforts. Here's how to start breaking down those silos and building data momentum.

81%

of IT leaders say data silos are hindering their digital transformation efforts.

[Source: Mulesoft's Connectivity Benchmark report, 2024](#)





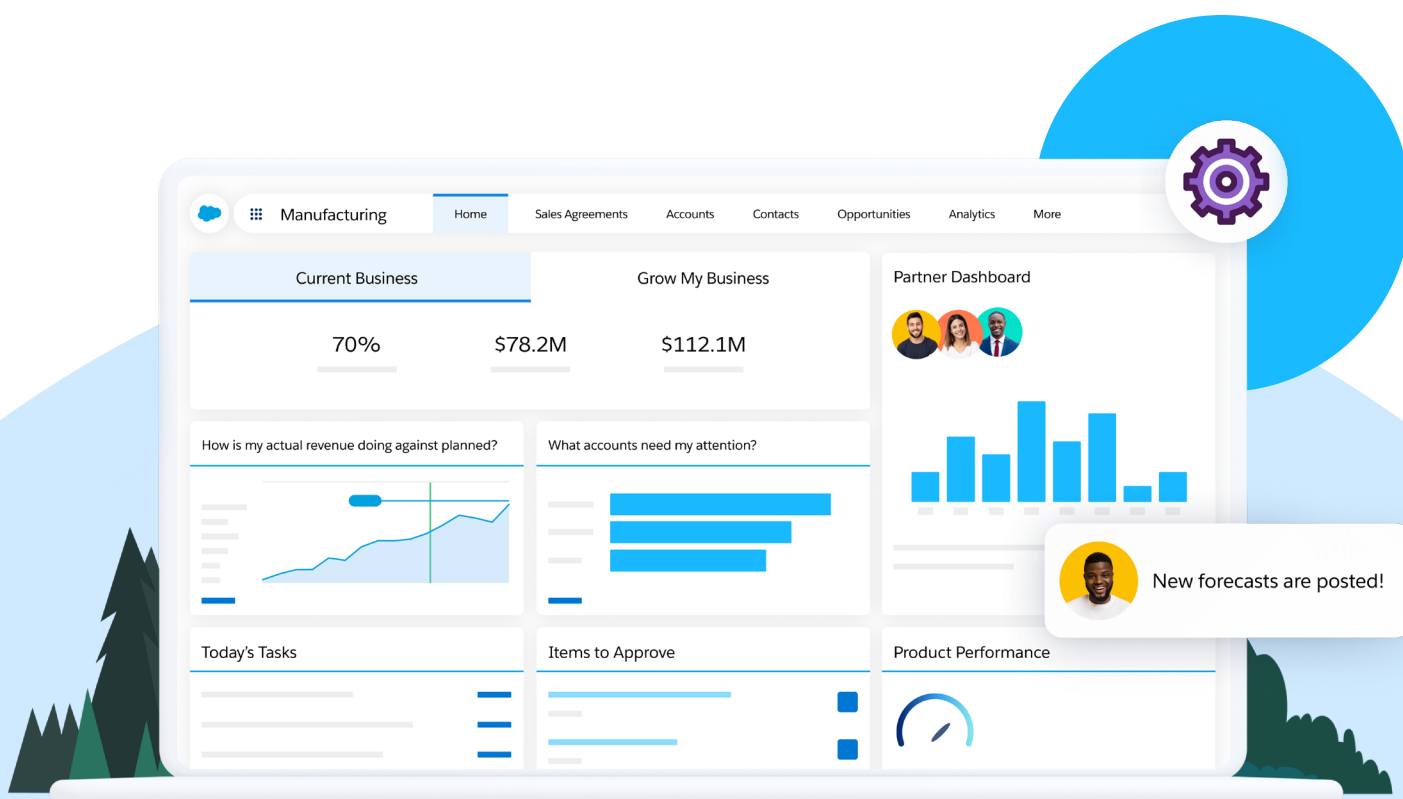
A Data Unification Platform

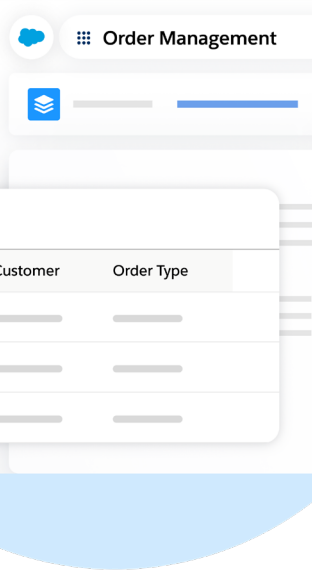
You need a platform to power a single source of truth. But what does that platform look like? And how can it unify and automate information access across the value chain that ultimately improves efficiency, innovation, and customer experience?

Customer relationship management (CRM) systems like [Salesforce Manufacturing Cloud](#) have deep integration capabilities purpose-built for manufacturers – ensuring that your integrated system data is accessible to every user that needs it, despite the many ERPs and other data resources in the equation.

CRMs can even automate the gathering of partner data in a uniform way. From dealers to distributors to engineering firms, your data set will be the same for all sales channels, powering parity and utility.

The data your team needs lives in a single engagement layer, customized for each user's profile, helping them get what they need when they need it. This translates to better opportunity visibility and a better-informed go-to-market pattern, which leads to increased sales, superior service, and greater customer satisfaction.





Installing and Activating Your Solution

How do you use your platform to its fullest?
Broadly speaking, that's a five-step process.

Recent Activity			
Invoice	Status	Customer	Order Type
00000412	Paid	—	—
00000411	Refunded	—	—
00000410	Paid	—	—

Step 1: Mapping Your Data

The first step is identifying all of your data sources. From orders to invoices to product information to emails – get clarity on what kind of data your business is made of.

Map this data carefully and map it thoroughly – know exactly where everything is in your data environment. This work is the foundation for the whole process, and knowing the landscape will ensure you can answer the questions that come later in an accurate, productive way.

Step 2: Accessing Your Data

Now that you know all the data you're dealing with and where it is, it's time to validate its quality and define who will be accessing it and how.

You'll need to harmonize your data – purge duplicates, align or account for differing field conventions in different systems, and generally scrub the data clean as you're integrating it. As to *how* you'll integrate it, that depends. Some of the data can be imported instantly. Some of it will need to be imported in batches over days or weeks. Some of it won't be imported at all, but referenced as needed via zero-copy framework (securely accessed from external sources on-demand).

An ideal platform will simplify the technical aspects of this stage – with intuitive APIs that connect seamlessly to every ERP, Product Lifecycle Management (PLM) system, product database, and warranty system. But the strategic part of this step may need special attention. Without a thoughtful integration strategy, the process can take longer or ultimately fail.





As you develop your strategy, think in terms of:



Use Cases and Data Needs

Who is going to need a given set of data and what are they going to do with it?



Experience and Capabilities

What kind of experiences will you create with the data? Is it a self-service module for customers? Is it serving to mobile or only desktop?



Architecture Principles

Don't just work on a case-by-case basis. With every question you answer, work toward a set of guiding principles that can steer future data integration decisions.

A solid strategy will naturally lead you to build an environment that protects the quality of your data and enriches it over time.

Step 3: Apply Automation to Your Data

The next step is building the automation capabilities to use your data to serve different user personas faster and better – from marketing to sales to service to partners to customers. This helps with driving efficiencies and productivity.

This is where the notification from the IoT printer we mentioned earlier is identified immediately and action is initiated. The customer is contacted and the work order is created. The parts needed are identified and their availability is checked. The technician is scheduled and instructions for the needed repair are provided. And little or no manual intervention is required.

Automation could raise productivity growth on a global basis by as much as

41% annually

[Source: McKinsey Global Institute, Executive Summary, 2017](#)

The more automation, the more every user is able to self-serve, delivering more productivity. How much more? [McKinsey](#) estimates automation could raise productivity growth on a global basis by as much as 1.4% annually, with an overall impact in the trillions of dollars.



Step 4: Visualization and Analytics

Your data is now supporting and improving your day-to-day operations. But it can still do more. It can tell you just how well those operations are running – from where your revenue is trending to where your productivity is lagging.

With all your data surfaced and automation in place, you can uncover the analytic insights that will propel your business to the next level. The incomplete picture that once cast doubt on your strategic vision and derailed your progress is a thing of the past.

According to a survey of more than 1,000 senior executives conducted by PwC, highly data-driven organizations are [three times more likely](#) to report significant improvements in decision-making compared to those who rely less on data. In other words, the better your data, the better your decisions.

That said, the impact of data is dulled if it isn't understood quickly and accurately. So let's talk about visualization. As [Deloitte](#) puts it, "Data visualization ensures that key values can be acquired from massive sets of data." Having all your data in reach and the tools to intelligently parse and interpret that data makes a huge impact, but being able to easily absorb the conclusions and articulate them to others has an even greater impact. So a strong data unification platform should serve up visualizations that play a powerful daily role in your business.

Data visualization ensures that key values can be acquired from massive sets of data

[Source: Deloitte Article, The Five Benefits of Data Visualization](#)

Step 5: Predictive AI and Generative AI

We've talked about a lot of your data's potential. But your data isn't done yet. With the right platform, it can be used to provide a glimpse of the future and make intelligent recommendations. Through artificial intelligence (AI), analysis can evolve into action. Not only will your tools identify revenue shortfalls, operational inefficiencies, and more – they'll propose solutions, with AI informed by historical interactions.





Essentially, the future of your business can be intelligently modeled and the best-predicted outcomes pursued with keenly considered actions. AI can analyze sales histories and deliver sales recommendations. We see a simple version of this at work every day on Amazon: “People who bought this also bought...” But AI can go deeper, recommending product bundles that offer a discount to customers and drive volume for sellers. Likewise, when a customer contacts a call center about a failing asset, AI can direct the responding service agent based on asset service histories, health scores, knowledge articles, and fault codes. And in many cases, the recommendation could lead to upsells through service contracts or extended warranties.

Salesforce’s Sales Agreement embedded AI can analyze sales agreements to see which companies have fallen short of their agreements, and guide actions.

In short, generative AI will unlock the potential of your data at every level of the organization. As [Forbes](#) puts it, “Never before has analytics-driven decision-making been as crucial as it is now for a company’s development. In an uncertain and unpredictable macro environment where the customer is in control, businesses cannot afford to wait for insights from the small pool of existing data scientists.”

Of course, as AI becomes more of a factor, it’s critical to evaluate safeguards for this new frontier. Your trust in the safety of your (and your customers’) data needs to be earned and validated with substantive measures. In building the [Einstein 1 Platform](#), we identified these crucial [trust-earning features](#):

- **Dynamic grounding** steers large language models (LLMs) – “grounding” them in factual, relevant data and preventing AI hallucinations, or incorrect responses.
- **Data masking** replaces sensitive data with anonymized data to protect personal information and comply with privacy requirements.
- **Toxicity detection** flags toxic content such as hate speech and negative stereotypes.
- **Zero retention** ensures prompts and outputs are erased and never stored in an AI model.
- **AI auditing** makes sure systems are working as expected, without bias, with high-quality data, in line with regulatory and organizational frameworks.
- **Secure data retrieval** lets users safely bring in the data they need to build contextual prompts – with every interaction secured by governance policies and permissions.

If you’d like to get to know the world of AI better, check out our [Generative AI Glossary](#).

Getting Started

While we've described a five-step journey, the impact will be felt as you go. Once you've mapped your data landscape and put a platform in place to navigate that landscape – per steps 1 and 2 – you'll start to reap tremendous rewards with each subsequent step.



So it's not about finishing the journey, it's about beginning it.
If you're ready to take the first step in turning your data into powerful insights and actions, watch our [Manufacturing Cloud demo](#).

*Source: 2024 Salesforce Success Metrics Segment Highlights study. Data is from a survey of up to 70 Salesforce manufacturing customers across the US, Canada, UK, Germany, France, Australia, India, Japan and Brazil** conducted from June 30 to July 21, 2022. Results were aggregated to determine the average perceived customer value from the use of Salesforce. Respondents were sourced and verified through a third-party B2B panel. Sample sizes may vary across metrics.

By the numbers

Manufacturers who have adopted Salesforce solutions are experiencing these results on average*:

35%

Faster automation of business processes

40%

Faster case resolution time due to automation

35%

Improvement in efficiency due to protecting and securing data

