



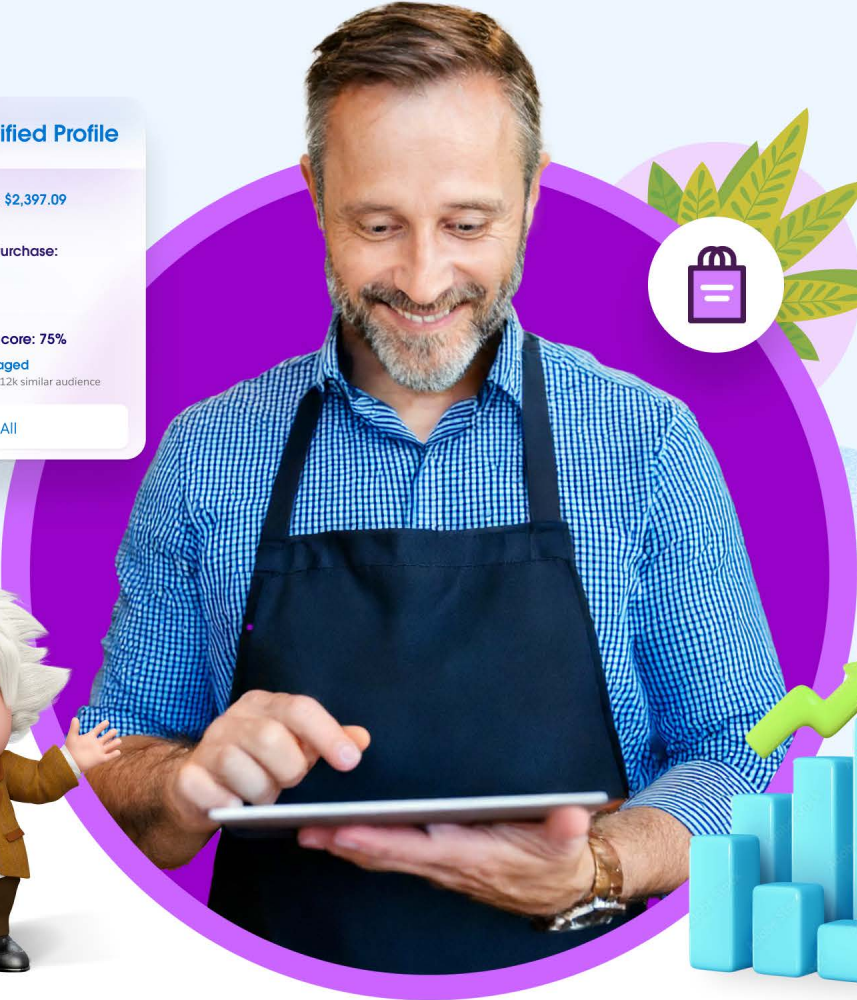
# Go from Guesswork to Growth with Retail Data and AI

With a modern tech stack, you can streamline operations, reduce costs, and win shopper loyalty.

**Customer Unified Profile**

- Lifetime Value: \$2,397.09**  
Average 1,852
- Propensity to Purchase: More Likely**
- Engagement Score: 75%**  
**Highly Engaged**  
Compared to 12k similar audience

[View All](#)



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# Introduction

What a time to be a retailer! You've stopped thinking in marketing segments to focus on meeting the needs of individual shoppers. You're serving up automated, personalized recommendations and offers based on their location, basket, and browsing history. Your modern point-of-sale (POS) system connects shoppers across all touchpoints, so they can start a transaction online and complete it in the store. Your in-store associates, customer service representatives, website, marketing team, and social media accounts collaborate to offer a connected shopping experience from start to finish. Fulfillment is faster, returns are easier, and customers are happier. And it's all thanks to your trusted data.

Wait – you're not doing that right now? You don't have the bandwidth or resources? Or even the data? Or maybe the project is just too complicated? If you can't offer this level of connected and personalized engagement, you might need to rethink how you're collecting and using data. A number of issues could be holding you back. Things like siloed data, disparate data formats, lack of a holistic data strategy, and legacy systems that are ingrained but inefficient. Let's look at how you can unlock trapped data and put it to work across your operations.



CHAPTER 1

# Retail growth starts with your data.



## Retail growth starts with your data.

Data silos and inaccurate, outdated, and incomplete data can lead to bad decisions, inefficiencies, and an unsatisfactory customer experience. Your employees may feel the stress, too. [Burnout, for example, is common in overworked customer service reps.](#)

But when you try to integrate disparate legacy systems with modern data management tools, the task can be complex and expensive, causing delays, downtime, and employee frustration. All can result in a poorly executed data strategy across the business.

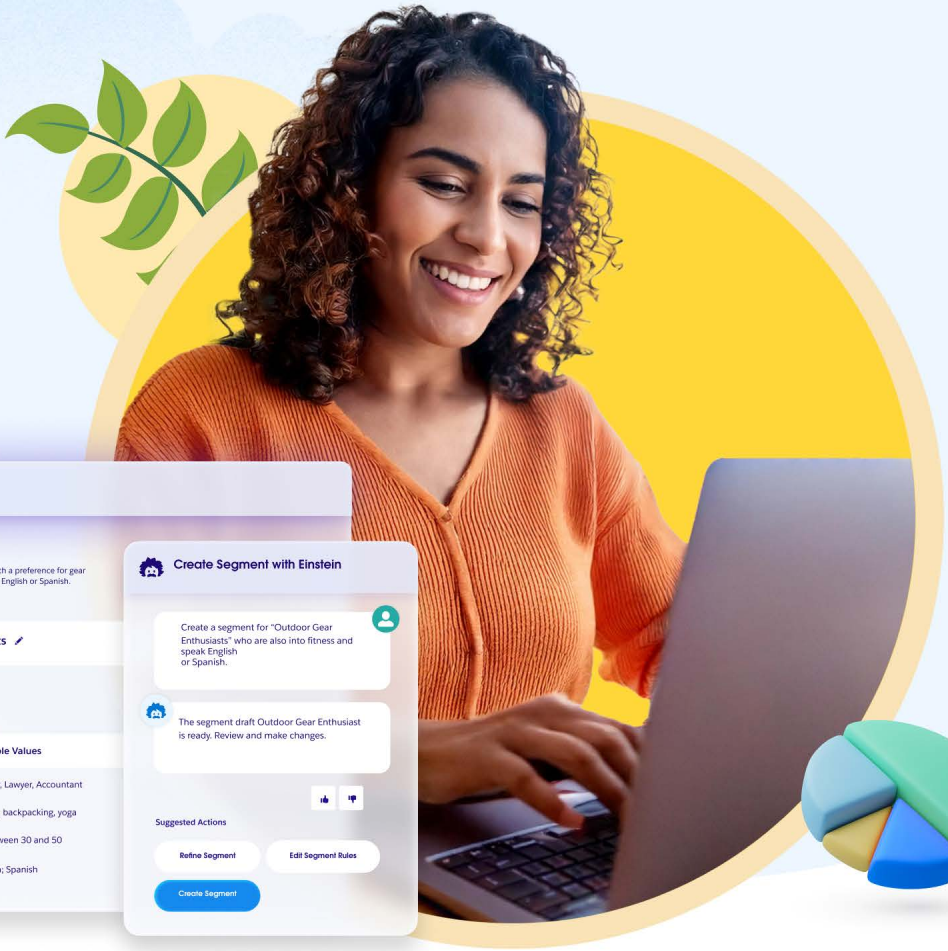
You can address these challenges with a comprehensive approach that includes investing in the right technology, fostering a data-driven culture, and ensuring compliance with regulations. Once you do, you'll unlock the full potential of your data and achieve a significant return on your technology investments.

This can mean a lot of heavy lifting for your IT team. To accelerate time to value, you should consider a platform like [Data Cloud](#).



## CHAPTER 2

# Unified data changes everything.



**New Segment**

**Segment Description**  
Target audience interested in fitness and with a preference for gear related to outdoor activities and who speak English or Spanish.

**Outdoor Gear Enthusiasts** ✓

Primary Data Model Object  
Unified Individuals

Attributes	Possible Values
Occupation	Doctor, Lawyer, Accountant
Hobbies	Hiking, backpacking, yoga
Age Range	In between 30 and 50
Language	English, Spanish

**Create Segment with Einstein**

Create a segment for "Outdoor Gear Enthusiasts" who are also into fitness and speak English or Spanish.

The segment draft "Outdoor Gear Enthusiast" is ready. Review and make changes.

Suggested Actions

Refine Segment   Edit Segment Rules

Create Segment



# Unified data changes everything.

[Data Cloud](#) helps your IT team unify and manage data from various sources, so you can create a holistic view of your operations and customers. You can integrate data from [customer relationship management systems \(CRM\)](#), ERP, e-commerce platforms, and third-party applications, using [pre-built connectors and APIs](#) to simplify the process. That means you break down data silos and ensure data quality more quickly and cost-effectively, without the need for extensive technical expertise.

The platform offers robust data cleansing, deduplication, and tools to ensure data accuracy and consistency. It also includes built-in data governance features to help retailers meet global data privacy regulations such as [GDPR](#), [DPDP](#), and [CCPA](#). And to help you get started (and keep moving forward), Salesforce provides extensive training resources, certifications, and a community of experts to help your team build the necessary skills to manage and analyze data effectively. For extra assistance, the Salesforce Professional Services and Success Plan teams are ready to jump in and offer support.

“**The fastest way to CRM and AI innovation is to get the data right. Whatever a business uses, Data Cloud is going to bring all that data together into a single source of truth to power CRM and AI, so the mapping and modeling can activate data in a way that aligns with business priorities.**”

**RICHARD KNIGHT**

SR. DIRECTOR, DATA PRACTICE, SALESFORCE PROFESSIONAL SERVICES



Once your data is unified and accessible, it adds power and insight to the technologies changing the retail industry. These include:

## Customer relationship management

A [robust CRM system](#) helps you easily integrate your data from sales, marketing, service, and external sources, including all customer touchpoints. With this information, you can build a comprehensive view of each shopper, with visibility into engagement and behaviors across the entire customer lifecycle. With real-time data integration and processing capabilities, you can deliver personalized content, offers, and service that increase customer engagement and conversion rates.

## Modern point of sale (POS)

Modern POS systems, like [Salesforce's Retail Cloud](#), are advanced platforms that go way beyond processing transactions. They integrate seamlessly with [inventory management](#), CRM, and analytics tools, providing a comprehensive view of store operations.

With Retail Cloud with Modern POS, for example, you can unite transactions from anywhere in the Cloud. The mobile POS (mPOS) solution transforms lightweight, handheld devices into functional points of sale, giving customers and store associates unprecedented freedom and flexibility throughout the purchasing journey. Cash and card payment transactions are encrypted and stored on a local device, so the system works during a loss of internet connectivity, in remote or outdoor locations, or when dealing with peak shopping seasons that strain the network. Plus, AI is embedded in Retail Cloud, so everyone can access functionality like AI-based voice assistants, return fraud analysis, and personalized product recommendations to maximize sales and revenue.





## Humans working with agents

Retailers have been using predictive AI for quite some time, and in the last year or so, have been turning more often to [generative AI to automate processes](#). Now, you can build agents, which perform tasks or make decisions on behalf of an employee or team.

[Agentforce](#), for example, is integrated with the Salesforce CRM you use every day. You can build any agent you need for any task, using dropdown menus and conversational instructions. These agents can help customers or employees autonomously, at any time, and across any channel – sales, service, marketing, commerce, and more – by taking specific retail-related actions based on your trusted data and defined guardrails.

**“ When building an Agentforce strategy, it’s important to take a Chief-Experience-Officer mindset. What does the ideal customer journey look like? How will agents improve the user experience? What data is needed to make it intuitive? Creating a plan that maps to your business’ goals – but is rooted in delivering the best customer experience – will set you up for long-term AI success, not just a moment-in-time fix.”**

**SCOTT ROHRKEMPER**

SR. CUSTOMER SUCCESS MANAGER, SALESFORCE RETAIL PRACTICE

Agents, which can be customer- or employee-facing (or both), can provide round-the-clock customer support, handling online and phone inquiries and reducing response times. They can analyze vast amounts of customer data to offer personalized product recommendations in real time, enhancing the shopping experience and driving sales. Agents also can help with returns, exchanges, and product troubleshooting. Additionally, they can automate routine tasks like inventory management and order processing, reducing operational costs and increasing efficiency.

Combining your CRM with modern POS and agents enables a seamless, data-driven approach to the customer journey. You’ll be able to deliver personalized experiences at scale, increasing customer loyalty and driving repeat sales.



CHAPTER 3

# Drive ROI across your retail organization.



# Drive ROI across your retail organization.

When you put your data to work across your organization, you achieve ROI through streamlined processes, increased productivity, and more successful sales opportunities. Let's look at the top use cases you can deploy throughout your organization.

## Marketers win and engage more profitable customers

With a strong data strategy and a unified data platform, marketing teams can collect, analyze, and use customer data more effectively to gain a deep understanding of shoppers' behaviors and preferences.

This leads to the creation of highly targeted and personalized campaigns as well as the ability to track campaign KPIs instantly, including return on ad spend, marketing ROI, customer acquisition cost, conversion rates, and customer lifetime value. These insights help the marketing team optimize and pivot tactics if needed. By focusing on the channels and messages that deliver the best results, marketers can minimize waste and maximize the impact of their spending, ultimately driving up ROI.

Again, [agents](#) are playing a role. Agentforce Campaigns helps retailers improve marketing ROI by assisting in the end-to-end campaign experience, from generating briefs to analyzing results.

Here's how it works: Agentforce streamlines end-to-end marketing campaigns by combining human expertise with AI capabilities. The platform allows users to design and build their campaigns, with AI agents grounding natural language prompts in data from Data Cloud to create campaign briefs, content, and segments for the team's approval. Human marketers can review and adjust these suggestions, ensuring the campaign aligns with their strategic vision. Post-campaign, agents assist in analyzing results and generating insights to improve future marketing efforts, with human marketers validating and implementing these learnings.

By integrating with CRM systems and leveraging AI, Agentforce provides your marketing team with real-time customer data and insights, so they can deliver personalized communications across multiple channels. With better data utilization and streamlined processes, you can optimize your marketing strategies, enhance customer experiences, and ultimately achieve a higher return on marketing spend.



## Modern point of sale connects online and in-store shopping experiences

Your point-of-sale (POS) system is key to transforming transactional data into actionable insights. By integrating your POS data with other data sources like customer profiles, order management, ecommerce data, and inventory management, you can gain a holistic view of your store operations. This helps all teams identify best-selling products, optimize inventory levels, and tailor in-store promotions to customer preferences, driving increased sales and profitability.

But the real magic happens when you give store associates access to this data. Today's average store associate uses more than 12 different systems daily. However, with a modern POS like [Retail Cloud](#) natively connected to shopper and inventory data, store associates can access everything in one place. Modern POS systems offer one intuitive, user-friendly interface that connects associates to all the shopper, store, and inventory data they need. Store employees can access clienteling, inventory management, loyalty, and order management systems, increasing their efficiency while simplifying the customers' shopping experience.

With mobile POS (mPOS) systems, they can offer more personalized service to every shopper and process transactions anywhere in the store. They can also use the data to enhance the physical shopping experience, such as optimizing store layouts, managing inventory more effectively, and offering personalized recommendations to customers. Further, you can add self-checkout kiosks and automated systems to reduce wait times and improve the overall shopping experience.



Data-fueled POS systems really shine in these specific use cases:

### **Clienteling**

Retailers can use AI and data to provide more personalized in-store experiences that show shoppers you see them and value them. AI can help you track customer interactions and feedback, so you can build comprehensive customer profiles and foster stronger, long-term relationships. The data empowers associates to offer tailored product suggestions, cross-selling opportunities, and even styling advice, creating a more engaging and individualized shopping experience. This [data-driven approach to clienteling](#) not only boosts customer satisfaction and loyalty but also drives increased sales and revenue.

For example, as Sydney enters her favorite fashion boutique and approaches the counter, sales associate Kam quickly pulls up her profile on the POS system. Kam greets Sydney by name and says they've just received a new collection of eco-friendly dresses, which he knows she recently viewed online. Kam shows her a beautiful green dress that would pair perfectly with the sweater she bought last time. Sydney's shopping experience is more memorable and enjoyable – and also increases the likelihood of both a sale and long-term customer loyalty.

### **Inventory and shelf management**

POS systems, equipped with AI and data analytics, provide immediate insights into inventory levels and sales trends, so you can make informed decisions about stock management. By predicting demand patterns and identifying fast-moving and slow-moving items, these systems help optimize shelf space allocation, so popular products are always readily available. Plus, you can use computer vision and AI to monitor shelf health, detecting gaps, misplaced items, or low stock, and alerting staff to fix these issues promptly. AI algorithms also can automate restocking processes by setting dynamic reorder points, reducing the risk of stockouts or excess inventory. All of this results in better product availability and a more organized store.



### Endless aisle

Modern POS easily enables an [endless aisle strategy](#) so your customers can browse and purchase products that are not physically in stock at the store. With an endless aisle, associates and shoppers can browse a full product library of both physical and virtual goods. You'll never lose a sale due to unavailability – you can deliver any product to a home or store with ease. This not only reduces lost sales but also keeps customers happy by offering a wider range of products. Additionally, by integrating online and offline channels, retailers can optimize their inventory management, reducing overstock and stockouts, which improves overall profitability.

### Fraud detection

POS systems can also play a crucial role in helping you detect and prevent fraudulent activities. By monitoring transaction patterns and customer behavior, as well as unauthorized discounts and overrides, return volume anomalies, or multiple high-value transactions in quick succession, these systems can identify unusual activities that may indicate fraud. Then the system can alert store managers to investigate the situation.



## Commerce teams achieve higher conversions and cart value

[Commerce teams](#) greatly benefit from the holistic view of customer behavior – from marketing interactions to service cases and purchase history – achieved with a unified data platform and strategy. By integrating data from various sources, AI algorithms can predict demand, optimize inventory levels, and dynamically adjust pricing for maximum profitability. This not only boosts operational efficiency but can lead to increased revenue and customer loyalty.

Agents and human workers collaborate seamlessly in ecommerce. Agents handle tasks such as personalized product recommendations, inventory management, and customer service chatbots, providing data-driven insights and automating routine processes. Meanwhile, human workers focus on strategic decision-making, content creation, and complex customer interactions, using the AI-generated insights to enhance their work and improve the overall customer experience. This allows for more efficient operations and better customer experiences.

To break it down further, agents play a crucial role in helping the commerce team convert browsers to buyers. For example, [Agentforce Merchant](#) helps merchandisers build and operate their sites with conversational setup and goal setting. The agent can complete common tasks like generating personalized promotions, suggesting dynamic pricing, or proactively acting on data insights to optimize your site for higher conversion rates. As a result, retailers can dynamically adjust prices and promotions to respond to market fluctuations, reduce excess inventory, and ultimately drive higher profit margins.

For example, during a slow sales period for a popular brand of headphones, Elektrik City's agent analyzes sales data and recommends a 5% discount to boost sales without significantly impacting profit margins. This helps Elektrik City clear excess inventory, attract more customers, and ultimately achieve a higher return on investment by boosting sales volume.

AI can also predict demand patterns by analyzing historical sales data, seasonal trends, and customer behavior stored in the CRM. This helps you optimize inventory levels, reducing stockouts and excess inventory so the right products are available.



From your customers' perspective, agents can help improve the shopping experience. [Agentforce Personal Shopper](#), for example, helps customers find exactly what they're looking for, then enables seamless checkout across any digital channel. By tracking customer interactions, such as clicks, purchases, and browsing history, agents can understand individual preferences and deliver tailored product suggestions.

These systems also improve search functionality by understanding conversational language and context, so the most relevant items are prominently displayed. Integrated with ecommerce sites and messaging apps, the agent taps into enterprise-wide data – like catalog, product, customer preferences, and behavior – to deliver personalized, natural conversations and streamline purchases.

As a result, customers get to the right products faster, reducing clicks and increasing conversion. Instead of combing through product listing pages or tweaking keywords, agents enable customers to use everyday language to find what they're looking for. And because they're trained on data like product details, marketing insights, and customer reviews, agents can handle ultra-specific requests including color, neck-, and hemline requirements and price range.

## Service teams reduce costs and drive revenue with agents

AI helps you streamline service operations while improving customer engagement. Chatbots can answer frequently asked questions, freeing up customer service reps for complex cases, reducing wait times and lowering operational costs. AI-powered analytics help identify common issues and trends, so you can proactively address problems and optimize processes and training. This helps drive operational efficiency and improve service quality.

Agents, such as [Agentforce Service Agent](#), are already transforming customer service. [Agents can understand and respond to customer inquiries](#) within the guardrails you provide. For example, agents can handle simple or complex issues, such as providing a delivery date or managing a product return, in a personalized and conversational way. This greatly improves ROI by streamlining operations, enhancing customer experiences, and driving better business outcomes. Additionally, agents provide immediate insights into customer interactions, so your teams can identify trends, optimize processes, and make data-driven decisions.



Let's look at the top use cases for achieving data-driven ROI in customer service.

### Self-service

Chatbots and agents can help you provide personalized and efficient support. By offering [self-service options](#) and swiftly resolving queries without human intervention, these tools are welcomed by shoppers who want to quickly handle an issue on their own. Bots also reduce operational costs by handling high volumes of pre-defined customer interactions simultaneously, freeing up customer service reps for more complex tasks that require critical thinking and empathy. Finally, by gathering and analyzing customer feedback, agents go further by providing valuable insights to help retailers make data-driven decisions across the organization and improve overall customer experience.

### Returns

Data and AI significantly enhance the ROI and cost-effectiveness of the returns process for retailers by streamlining operations and reducing unnecessary expenses. By analyzing historical returns data, the agent can predict return rates and optimize inventory management, minimizing overstock and waste. Additionally, AI-driven chatbots can automate the returns process, providing customers with instant support and reducing the workload on customer service teams. Agents can also help both in-store customer service reps and contact center reps turn a return into an exchange by recommending products the customer might like better. Finally, agents can identify trends and patterns in returns data, helping retailers address recurring issues and improve product quality, ultimately lowering return rates and associated costs.

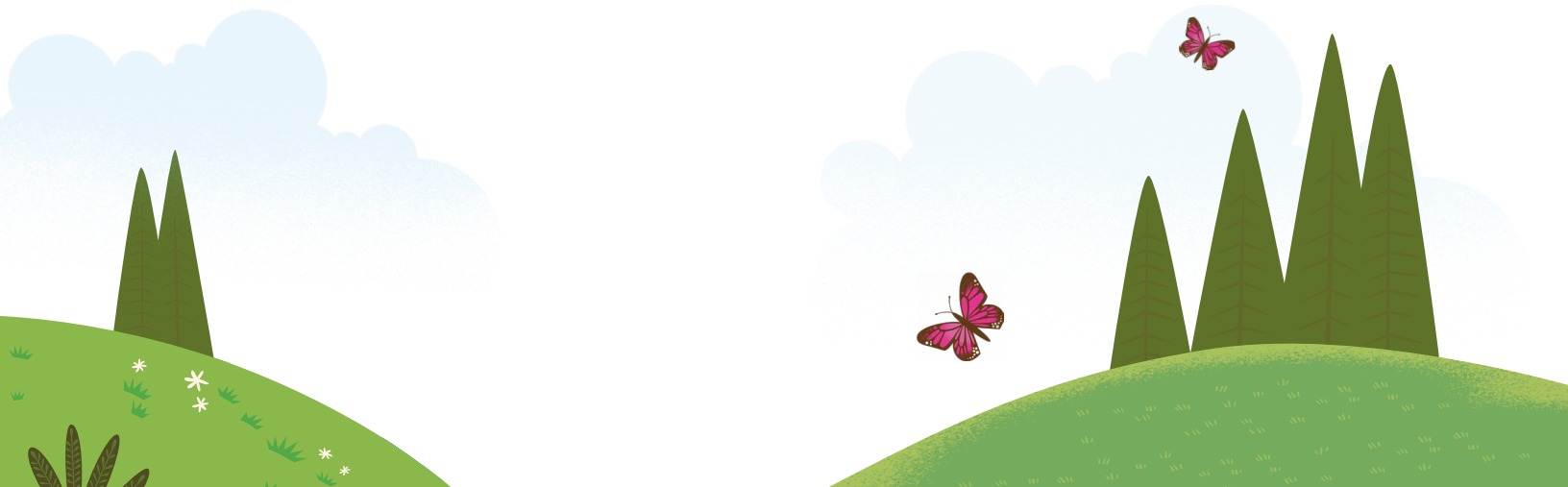


### Upsell and cross-sell

Agents help customer service reps [upsell and cross-sell](#) by providing real-time, data-driven insights and personalized recommendations. These agents can analyze a customer's purchase history, browsing behavior, and preferences to suggest complementary products or services that are most likely to interest them. By using AI's ability to process vast amounts of data quickly and accurately, customer service teams can offer more relevant and timely recommendations, helping them become trusted advisors and increasing the likelihood of successful upsells and cross-sells.

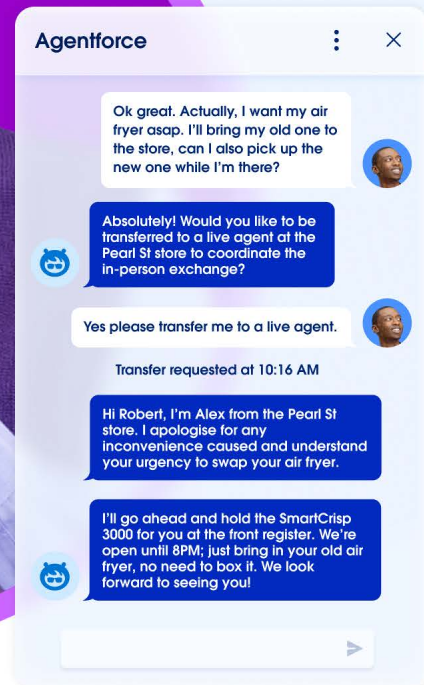
### Customer sentiment analysis

Agents can gather and [analyze customer sentiment](#) by first collecting data from sources such as social media posts, customer reviews, and support interactions. Next they process the data to identify and categorize sentiments, such as positive, negative, or neutral. Agents can further analyze this categorized data to detect trends, common issues, and areas of [customer satisfaction or dissatisfaction](#). Then you can use these insights to make data-driven decisions, improve customer service strategies, and enhance the overall customer experience.



## CHAPTER 4

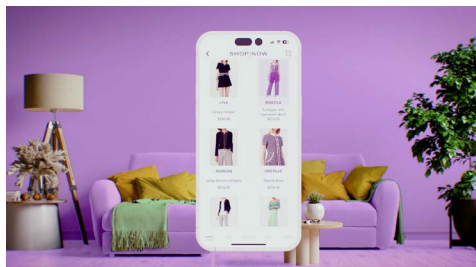
# Put it all together.



## Put it all together.

When you unify your data and make it accessible across your organization, you can optimize your technology investments, support your employees, and scale your operations while saving time and resources. Once-siloed departments can work together to support actions across the business and deliver on company-wide goals.

The retail landscape is more competitive than ever, with new players and disruptive business models constantly emerging. Unified data, gathered from your CRM and powered by Agentforce, can give you a competitive edge by driving more informed decision-making and boosting customer engagement. You'll differentiate your company through superior customer experiences, innovative product assortments, and efficient operations, building relationships and revenue with a competitive edge.



DEMO

**See how Retail Cloud uses your data and AI to drive revenue and relationships**

WATCH THE DEMO >

Need more help? [Salesforce Customer Success](#) is here to help through every stage of your Data Cloud and Agentforce journey. See how our team of experts can partner with you to unlock your data, build an AI strategy, and implement Agentforce with confidence.





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