



The Trailblazer's Guide to Apps

How apps are driving business transformation
in the Age of the Customer.

salesforce



From startups to global enterprises, over 100,000 customers power their businesses with Salesforce apps.

3,000+

pre-integrated apps built by partners to extend the power of Salesforce

4 million

apps installed from AppExchange

3 million+

members of our developer community

According to the IDC white paper, “The ROI of Building Apps on Salesforce” companies using Salesforce report:

50%

faster app development

38%

less time managing IT infrastructure

478%

ROI over five year span

Lucky us – we live in an age when anything seems possible.

Actually, everything is possible.

If you have the vision and the drive, the possibilities are endless.

In these pages, you'll meet the CIOs and CTOs, the IT leaders and developers, the admins and citizen developers who bring vision, energy, and passion to every role, team, and department – across every industry – to innovate with agility, to inspire, and go further.

Technology has smashed the barrier to entry in one industry after another. And now the barrier to entry for technology itself is lowering, which means everyone in your organization can lead the revolution that's transforming every industry.

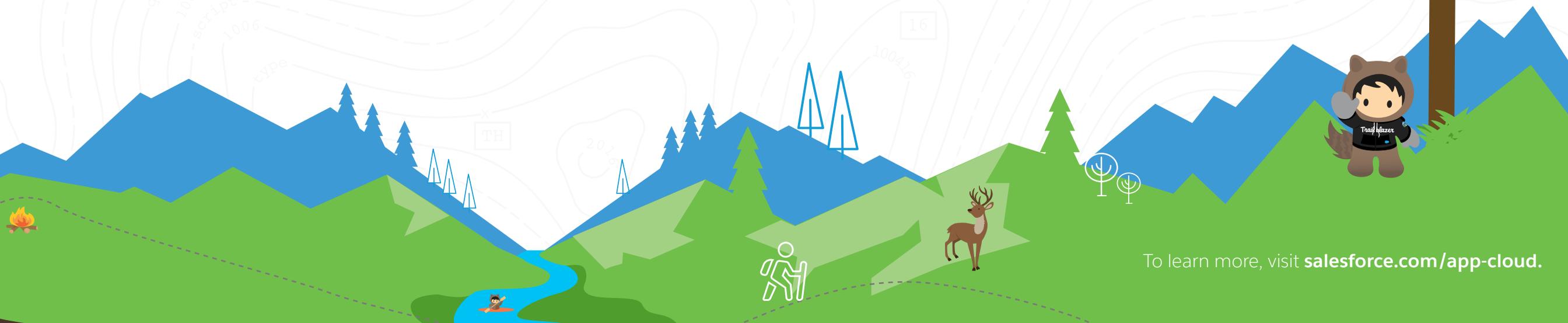
Meet the trailblazers



who are pushing the boundaries of what's possible by being their best. In this Age of the Customer, the real trailblazers are the innovators who are leveraging data, technology, and apps to build faster, build smarter, and build everything connected together.

So do you have what it takes to be a trailblazer? We know you do – all you need is a guide.

Let's get started.



To learn more, visit salesforce.com/app-cloud.

The fastest path to your customer starts with an app.

Trailblazing innovation comes in all sizes, from any department or role. Here are just a few companies – organized by industry – where people and teams are using Salesforce to lead the way and connect to customers like never before.

Automotive and Transportation

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WELCOME TO

Automotive & Transportation

The road to success

How trailblazers are reinventing customer relationships from point A to everywhere

No matter how much design changes, the basic elements of modern transportation have remained the same for a century. But that's all changing, fast. In a global marketplace, consumers have more choices than ever before and the differences between models and manufacturers is narrowing.

The real innovation in the industry is coming from the technology that's transforming everything from the shopping experience to what happens if you experience a breakdown. Global leaders like Toyota are leveraging technology to engage their customers at every point along their journey. At the same time, venerable brands like Triumph motorcycles are using apps to reinvent the rider experience. Even the railroad train is streamlining service with apps that keep passengers moving faster than ever. Read on to find out how far transportation has come in the Age of the Customer.





FOUNDED 1996 | LOCATION Detroit, MI | WEBSITE onstar.com

General Motors OnStar finds a way to **connect with customers on-and-off the road.**

For over a century, General Motors has been known as a maker of iconic cars and trucks that have inspired fierce loyalty for generations. For that reason alone, you could say that GM has always been a customer-centric company, innovating to create not just cars but customer enthusiasm.

But when Mary Barra became GM's CEO in 2014, she said she expected the car business to change more over the next five years than it had in the previous 50. With that prediction, she inspired one particular technology team at GM to think about how to create that kind of customer enthusiasm in ways that went beyond car body and engine design.

That GM team was OnStar, a service that had debuted some 20 years earlier as a way to connect drivers instantly to a help center whenever they were in trouble. The OnStar team thought not only about how to improve the service in the car, but also how it could bring in merchant partners and other services to offer customers a more personalized mobility experience.



“Twenty years ago, when OnStar was launched, we didn't realize that we would have the opportunity to provide value every single day. And not only value every single day, but value that's 1-to-1. Salesforce has provided us the ability to make that happen in a very big and scalable way.”

– Mark Lloyd, GM Consumer Online Officer





THE BUSINESS CHALLENGE

How to turn a connection with customers into an ongoing relationship

“If you talk to people about their priorities in buying a car, it’s safety, it’s fuel economy, it’s quality ... but those are table stakes now. ... So how do we differentiate our vehicles from our competitors? You’ve got to start by focusing on the customer.” – Phil Abram, Chief Infotainment Officer, GM

With more than 7 million current subscribers, GM OnStar has been a benchmark for in-vehicle safety, security, and communication services. But in looking at how OnStar could do even more to connect to customers, the team stepped back and thought about how the service could be part of the new connected-car experience. And that started with recognizing the need to find a better way to stay engaged with customers after a car was sold. In years past, when customers purchased a Chevrolet, Buick, GMC, or Cadillac vehicle, they used OnStar to help with directions, diagnostics, or an emergency situation. So how could the team develop an experience that would engage customers every day, and keep them coming back for more?

Today, one answer is known as OnStar AtYourService, and the idea for it came from a new understanding of the OnStar functionality

that customers were already using. As a service that people could access by pushing a blue button in the car, OnStar advisors are on call 24/7 to answer just about anything. “We had been studying our OnStar data, asking ourselves, where do people want to go when they call for directions?” said Mark Lloyd, GM Consumer Online Officer. “It turns out that 10% of our directions were to hotels. So it was pretty obvious that our customers were asking us through the advisor for that. And we do that, but it was evident that we could do it differently and more efficiently.”

By partnering with leading retailers and hotels to offer deals, coupons, and other location-based services, OnStar could tailor offerings to each customer’s preferences and location. In other words, AtYourService could point out to each driver the closest hotel or gas station with the best prices. It could even offer a coupon for a free cup of coffee at a nearby café.

To make this dream a reality, OnStar needed a proven, secure, reliable technology to build on that could also provide a tailored experience for each customer – at scale.



THE AHA MOMENT

A single solution can open so many opportunities.

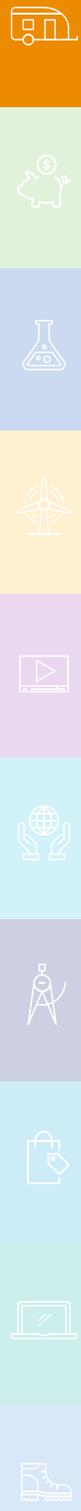
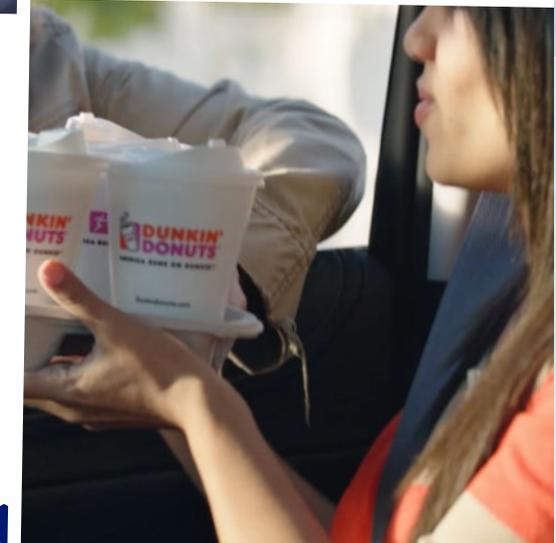
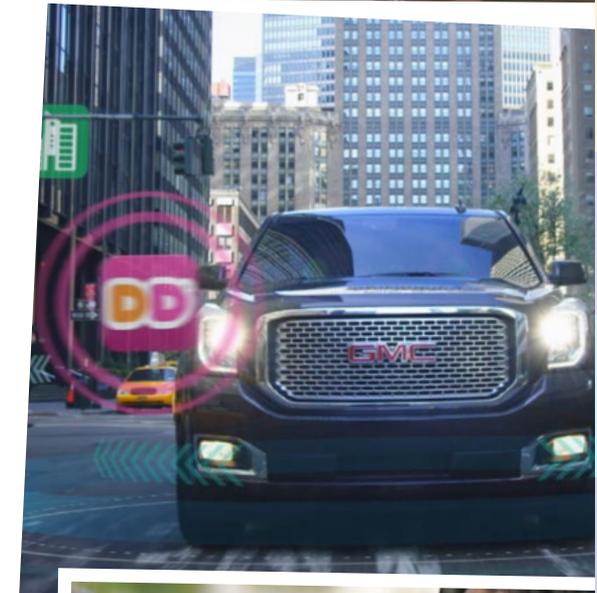
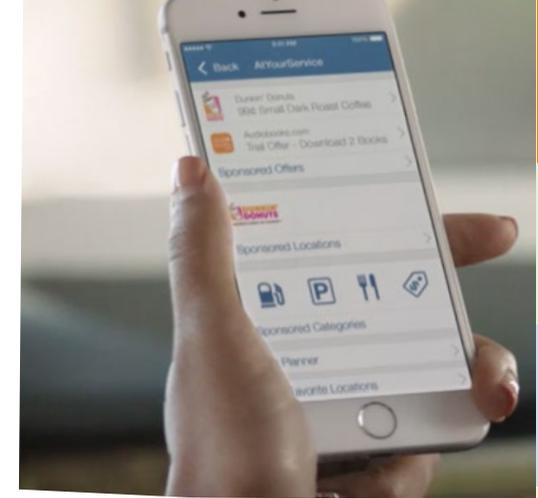
After doing some research, the OnStar team chose Salesforce as the foundation for its next generation of in-car services. It was clear that the Salesforce Platform provided the scalability and speed required to bring the idea to life, and the Salesforce platform already had the core functionalities GM needed to make it all work, fast.

For the OnStar team, the main issue was how to bring together all the great information the company had from all of the OnStar interactions and use it to provide more value to its customers. “We already know you need fuel. We know you need to park. We know you may be hungry because you’re on a long trip,” said Lloyd. “The Salesforce platform helps us organize all that – and do the heavy lifting behind the scenes to make it happen.”

 **“Now with the connected car, we actually have the opportunity to use platforms, in our case the Salesforce platform, to create new value that wasn’t present when you purchased your car. And you won’t need to wait for a service to get the upgrade,”** said Mark Lloyd, GM Consumer Online Officer.

Even more importantly, the team began to see opportunities within the platform that it hadn’t expected.

It’s an ability to grow, evolve, and scale that put the OnStar development team in the driver’s seat for business. “What we think is really fantastic with the system we put together with Salesforce is that it’ll grow,” Lloyd said. “We can do new experiences; we can do new things, as they emerge. It could be connected to your home, connected to a merchant, connected to anything.”





THE APPS

Take a look under the hood of the OnStar AtYourService App

Using the Salesforce Platform, the team of developers built AtYourService functionality to support an omni-channel offering, available with the push of the blue OnStar button, through the vehicle brands' mobile apps, and now on the dashboard in app-enabled vehicles. OnStar AtYourService allows drivers to connect with retailers and merchants while on the road, providing information and money-saving deals tied to their specific destinations at their fingertips. And the future looks even more exciting as the platform moves from offers and deals to interactions and transactions – from ordering coffee, to booking hotel rooms, to activating fuel pumps – all from the tap of the dash.





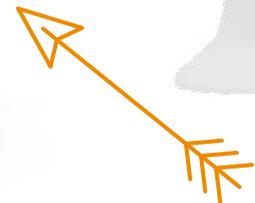
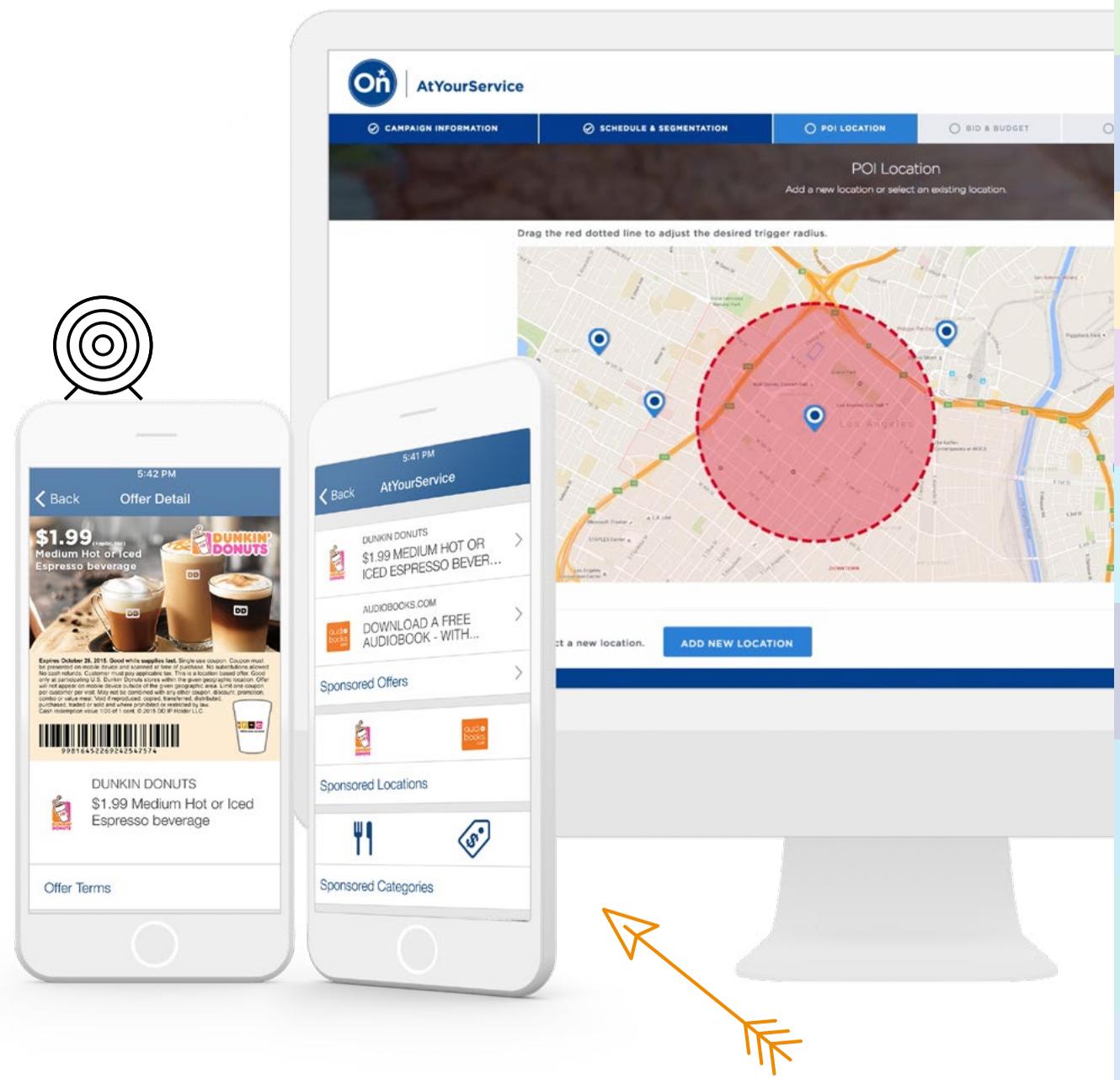
How the service works:

With the push of a button, drivers can speak with an advisor and get assistance in locating the closest hotel with vacancy, booking reservations, and even navigating there without ever lifting a finger in the car. On the back end, advisors find the locations and offers to fulfill the specific customer's needs. They do this by connecting to GM's back-end system, supported by the Salesforce Platform, which exposes content from a merchant community, also built with the Salesforce Platform.

The platform is also integrated with OnStar's existing call centers, where teams use Service Cloud to manage cases with merchants, as well as Marketing Cloud to drive email communications, personalized customer journeys, and relevant offers to each consumer. Merchants have the power to put offers directly into Salesforce and get analytics to see campaign results.

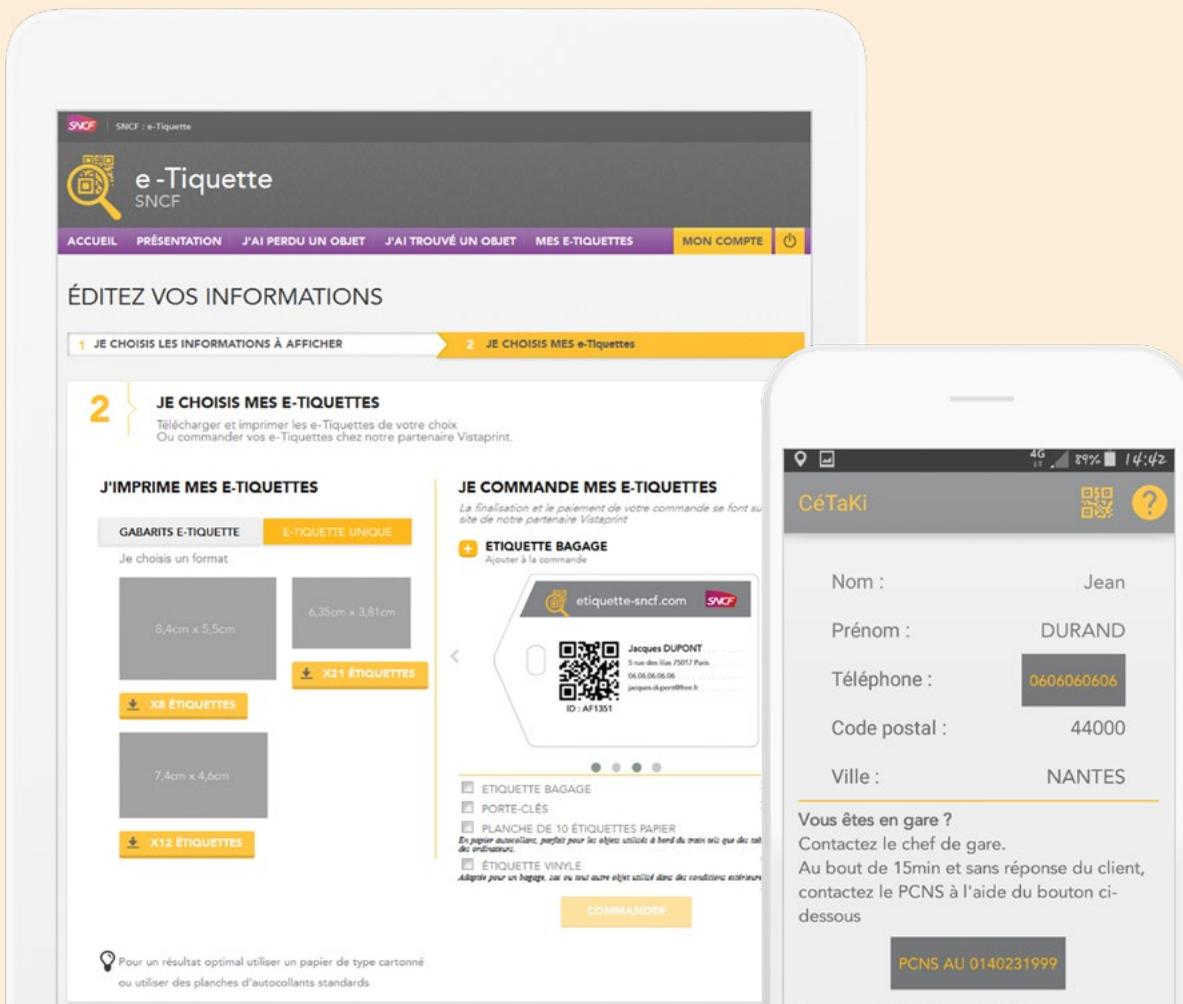
Additionally, drivers can also use the AtYourService app on their mobile devices from the comfort of their own homes. So before jumping on the road, drivers can look ahead, get an offer, and send the directions for navigation to their car, before they ever turn on the ignition.

SI Partner: IBM Global Business Services





French railway **takes passengers on new journeys** with mobile apps



Every day, 10 million rail passengers pass through the 3,000 stations run by SNCF Gares & Connexions, the French national railroad, and are transported to their destinations on one of the world's most sophisticated rail networks. But for all its efficiency, SNCF Gares & Connexions had little knowledge about its huge ridership and how to engage with these riders to build meaningful relationships. Additionally, SNCF Gares & Connexions was drowning in a sea of lost items, and had no way to contact riders to help return their belongings.

To help ensure all passengers get where they're going with their belongings, SNCF Gares & Connexions depends on two apps built with Salesforce for passenger ticketing and lost-and-found tracking.

SNCF Gares & Connexions' old lost-and-found app was expensive and complicated to run. It also offered a poor customer experience for people attempting to retrieve any of the 95,000 items misplaced in the system each year. In 2012, SNCF Gares & Connexions began using Salesforce to run its stations, and with the Salesforce Platform, the IT team built a new lost-and-found app with a customer-centric design approach. Called the





Oboto app, it allows customers to report lost belongings quickly and directly, while giving SNCF Gares & Connexions station agents the ability to respond and view in real time a dashboard of lost-and-found objects. One project manager and three developers built the app in just three months, and it's been upgraded several times over the past three years since its launch.

In early 2016, SNCF Gares & Connexions introduced an e-tiquette app that further enhances the usefulness of the Oboto app. Customers now can use the e-tiquette app to register online and generate QR codes, which can be printed or displayed on mobile phones. Those same QR codes can also be printed on luggage tags and stickers to attach to traveler belongings, identifying in code the owner's contact information.

Prior to the e-tiquette app's introduction, unaccompanied bags discovered in train stations were handled with caution because of terrorism concerns. Even for bags bearing name tags and phone numbers, if station agents were unable to

reach the owners within 15 minutes, the police were notified and the bags were destroyed. Putting e-tiquette tags and stickers on all travel belongings is the best way to guarantee that if passengers leave an item behind, it will find its way back to them.

The e-tiquette and Oboto apps have the added benefit of finally providing SNCF Gares & Connexions with a database of its customers, which hadn't been possible for the company prior to the adoption of Salesforce.

There are now 800,000 registered SNCF Gares & Connexions passengers, and as those numbers grow, the train system itself grows more secure. Found baggage with an e-tiquette QR code on it is much safer for SNCF Gares & Connexions employees to handle because they can instantly identify the proper owner from the company's Salesforce database.



10 million
daily passengers

3,000
train stations

95,000
items lost and found
each year

122,000
lost belongings reports





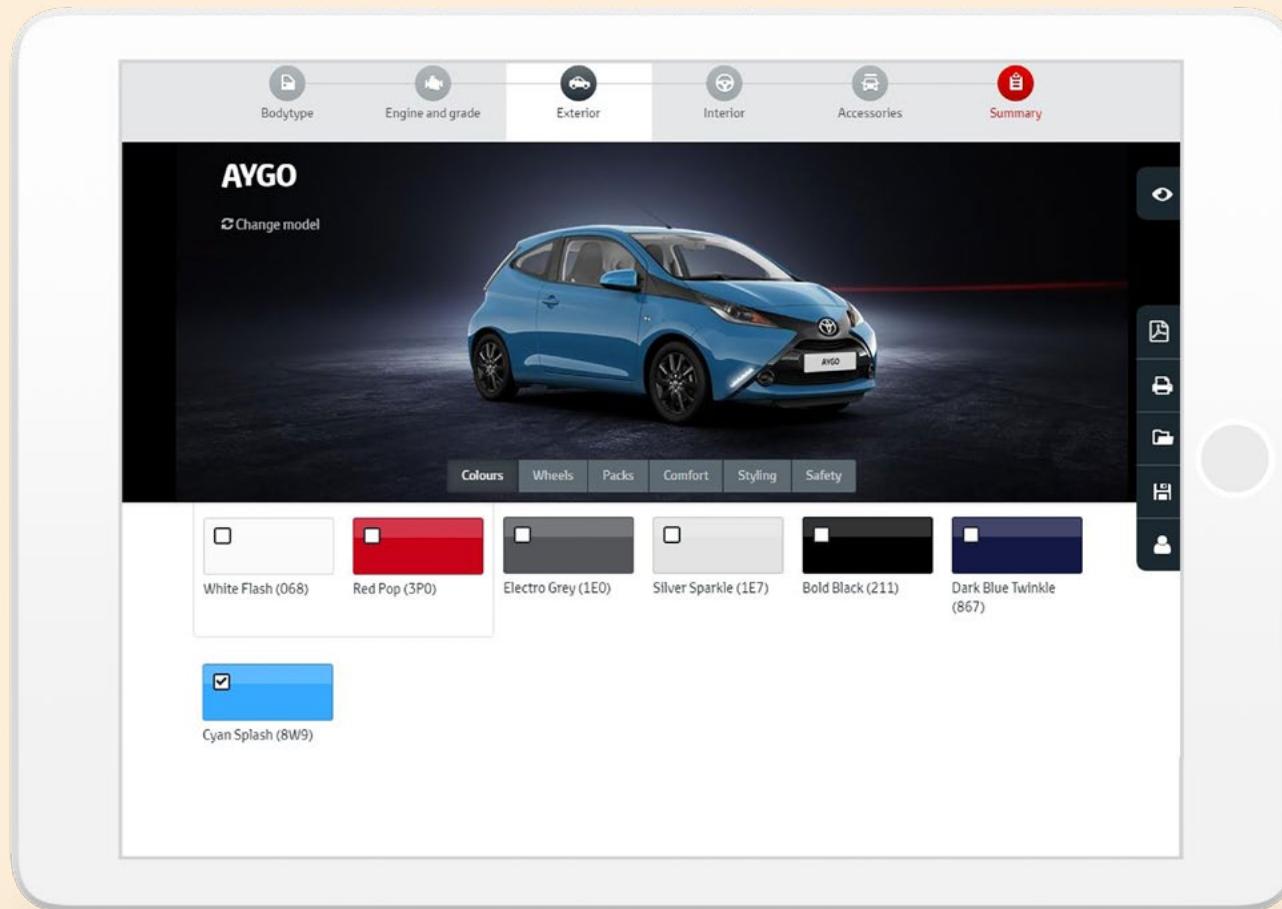
TOYOTA

TOYOTA MOTOR EUROPE

FOUNDED 1964 | SIZE 2,400 Employees | LOCATION Brussels, Belgium | WEBSITE toyota-europe.com



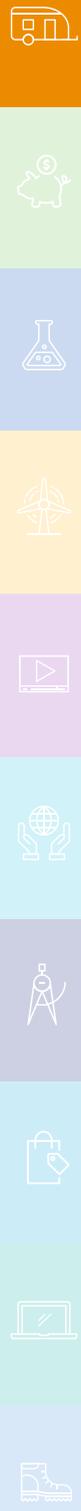
In any language, **this app speaks Toyota** fluently.



As the eighth-largest company in the world, Toyota Motor Corporation has annual sales exceeding \$250 billion. The European division of Toyota sells almost 900,000 cars every year across a vast area that includes all of Europe, plus Russia, Turkey, Israel, and several central Asian markets. That level of diversity presented the IT operations group at Toyota Motor Europe with a steep technology challenge: how to operate the primary customer web applications on 48 different multilingual websites.

“Toyota Motor Europe has a broad and complex portfolio of more than 40 interconnected customer-facing applications,” said CIO Pierre Masai. Masai and his team sought a solution beyond their on-site data center that could operate these critical applications at scale, and chose Heroku from Salesforce for their customer-facing cloud platform.

Toyota Motor Europe needed to build and scale its continentwide portfolio of customer-facing applications quickly. Whether someone visits “toyota.is” in Iceland, “toyota.kz” in Kazakhstan, or any of the other 46 sites for markets in between, this common core of apps helps online Toyota shoppers explore and personally configure car





models. Salesforce as its consolidated application platform, the IT operations group can now push out a shared customer experience across all its different territories, while customizing each application to the needs of each market.

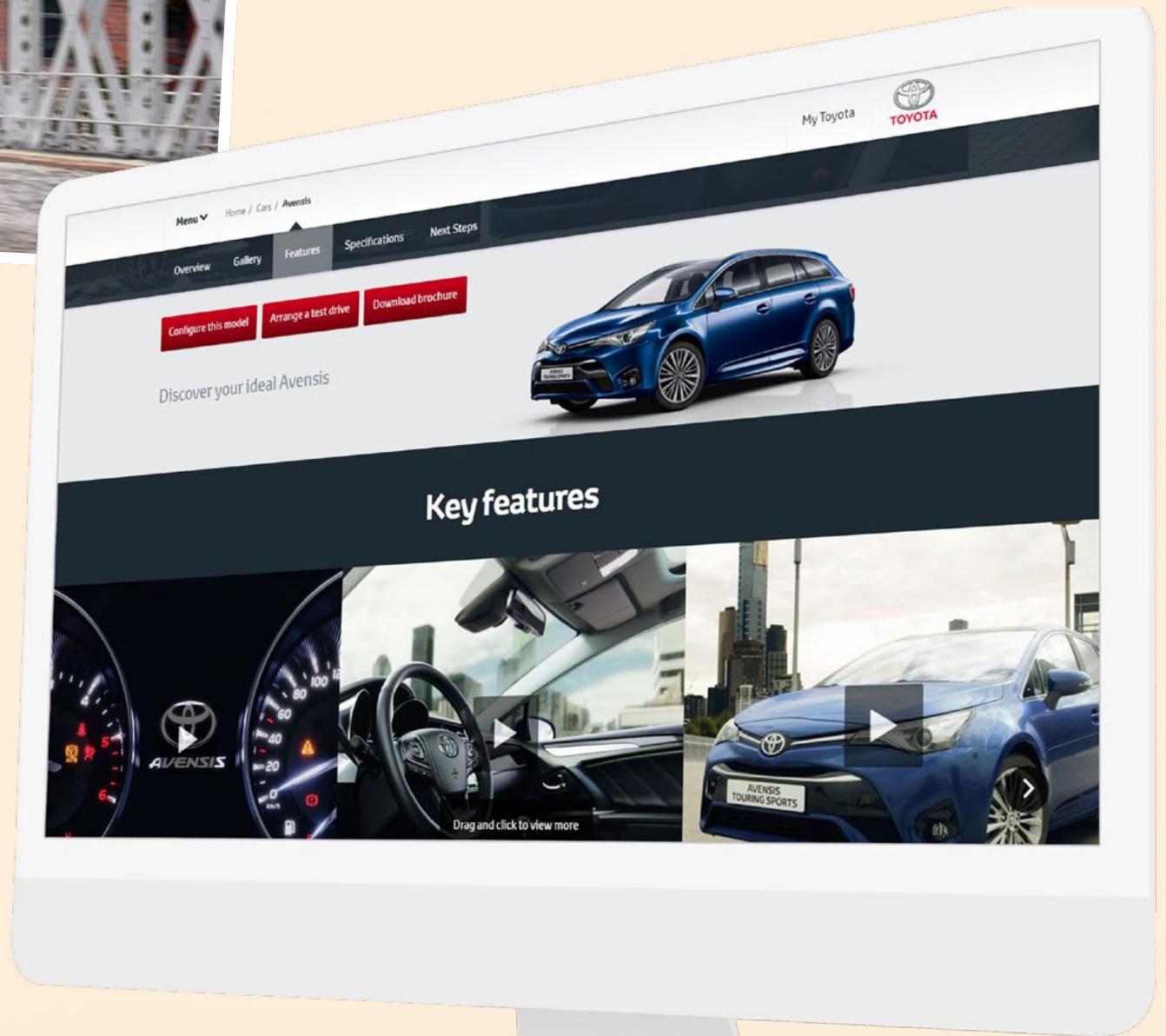
For Toyota Motor Europe, this newly unified web architecture is a first step in carrying out a larger vision to service, engage, and understand its customers through innovation.

🔥 “We rely on Heroku from Salesforce as the platform for mission-critical apps, and it is helping us transform how we connect and engage with our customers.”

– Pierre Masai, CIO

48
nations and territories

40+
customer-facing apps





FOUNDED 1902 | SIZE 60 Employees | LOCATION Atlanta, GA | WEBSITE triumphmotorcycles.com

Lean and mean – an iconic motorcycle brand **revs up** its business with apps



The need for speed has always been a part of company culture at Triumph, the legendary British motorcycle maker. At Triumph North America, the two-person IT team has found that Salesforce satisfies another need for speed, allowing them to build and deploy new apps fast, sometimes within just a few hours.

Triumph North America is a very lean organization, with just 60 employees. “In order to run lean, we need our back-end processes to be efficient,” said Jeremy Anderson, the company’s Salesforce administrator and developer. “Salesforce is our go-to solution for any issue we have across the business. Anything that we need, we can just build it in Salesforce.” The company has been a Salesforce customer since 2011, and currently about 90% of its Salesforce usage is custom-built applications.

Anderson has developed more than a dozen apps on the Salesforce Platform – for email marketing, inventory management, and even auto-stock preferences and profitability reporting for Triumph dealerships. A parts-return app allows dealers to punch in a part number and discover immediately whether it is eligible for return. The app automates and makes instantaneous a process that used to require several days. It also immediately generates a shipping label for each query.

For incentivizing sales teams, the Sales SPIFF Slot Machine app was proposed, built, and deployed within just four-and-a-half hours. The sales department wanted a fun and easy-to-implement method for encouraging more motorcycle sales at the dealership level. The simple app uses Apex code to determine winners and losers competing for prizes among dealership sales teams.





“The main benefit of Salesforce for us is the flexibility,” said Anderson.



“We scope, we build, we review, and we deploy. The ease of customization lets us build anything we need. The clicks-not-code philosophy makes it the best solution for our business needs.”

– **Jeremy Anderson**, *Salesforce Administrator and Developer*

4.5 hours

from idea to app





How trailblazers are making customers the new currency of finance

Not so long ago, banks and brokerage firms could count on their advisors' proprietary knowledge and client loyalty to safeguard their profits. But cultural and technological revolutions have shifted power to clients like never before. Today, customers can do their own financial research, create and execute their own financial strategies, and manage nearly every aspect of their financial lives from their smartphones.

In the following pages, you'll see how Salesforce is helping financial companies connect with their customers using the very technologies that are reshaping the world – from mobile apps that deliver credit decisions faster to tools that make it easier for advisors to be smarter and take action faster with customers, from anywhere.



The new IT – how low code is turning everyone into app builders

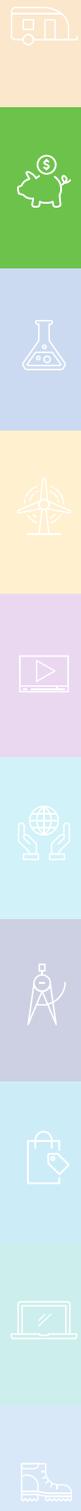


As the fastest-growing bank in Pennsylvania, Customers Bank turned to Salesforce to help organize and unite its sales operations. The bank’s technology chief saw the trailblazing potential for Salesforce to transform internal operations for the bank’s 500 team members.

“There was a very low learning curve to implement these applications,” said Alex Balagour, Senior Vice President for IT Strategy, Architecture, and Business Intelligence. He prefers the word “implement” to “develop” because the Salesforce Platform apps are so easy to work with.

Within just eight weeks, a two-person team of Salesforce administrators had created four apps that simplified critical business processes such as vendor and contract management, business continuity planning, and compliance with the federal Community Reinvestment Act. The bank also uses Salesforce Marketing Cloud to connect with customers and prospects.

Balagour cites flexibility, low cost, and speed-to-market as the chief benefits of working with the Salesforce Platform. The IT department was able to cut over \$100,000 in annual expenses for





off-the-shelf solutions by shifting its focus to app development and away from infrastructure. Team member productivity increased by an estimated 50% because of the new app's automated processes that had previously lived on spreadsheets. Two more Platform apps are still in development: a facilities lease management app and a new customer banking app.

 “It’s fun to walk through the hallways where our Salesforce users work. They love it, and that translates into efficiencies. It makes their jobs easier.”

– **Alex Balagour**, *Senior Vice President, IT Strategy, Architecture, and Business Intelligence*



4

Platform apps

8 weeks

from idea to app

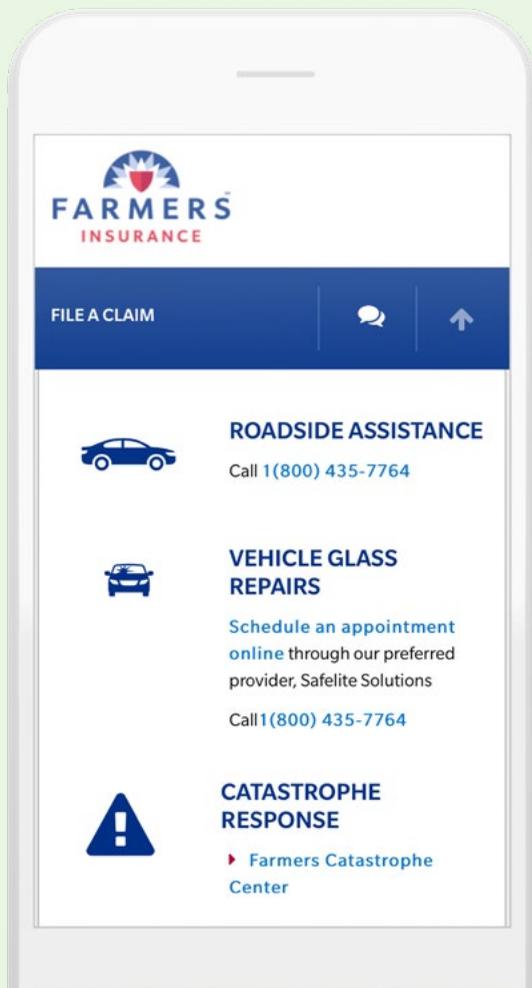
2 developers

building apps



FOUNDED 1928 | SIZE 21,000 Employees | LOCATION Los Angeles, CA (HQ) | WEBSITE farmers.com

Self-service **apps put additional power** in the hands of customers and agents.



As 88 years in business proves, Farmers Insurance® values customer service. Now, one of the nation’s largest insurance groups is further empowering its agents and offering greater self-service capabilities to millions of customers.

“We understand that consumer preferences are constantly evolving,” said Vivek Pandey, leader of Enterprise Marketing Architecture for Farmers Insurance.

 **“Our efforts in the area of technology innovation are driven by a commitment to improve the customer experience at all points of engagement, and we are continuously looking for new ways to meet the changing needs of our customers.”**

– **Vivek Pandey**, *Leader for Enterprise Marketing Architecture*

The Farmers® Customer Self-Service (CSS) app, built on Salesforce, offers customers the ability to view their policy documents, pay premiums online, and complete other tasks such as access their proof of insurance. Millions of Farmers Insurance customers can complete these tasks via their device of choice.

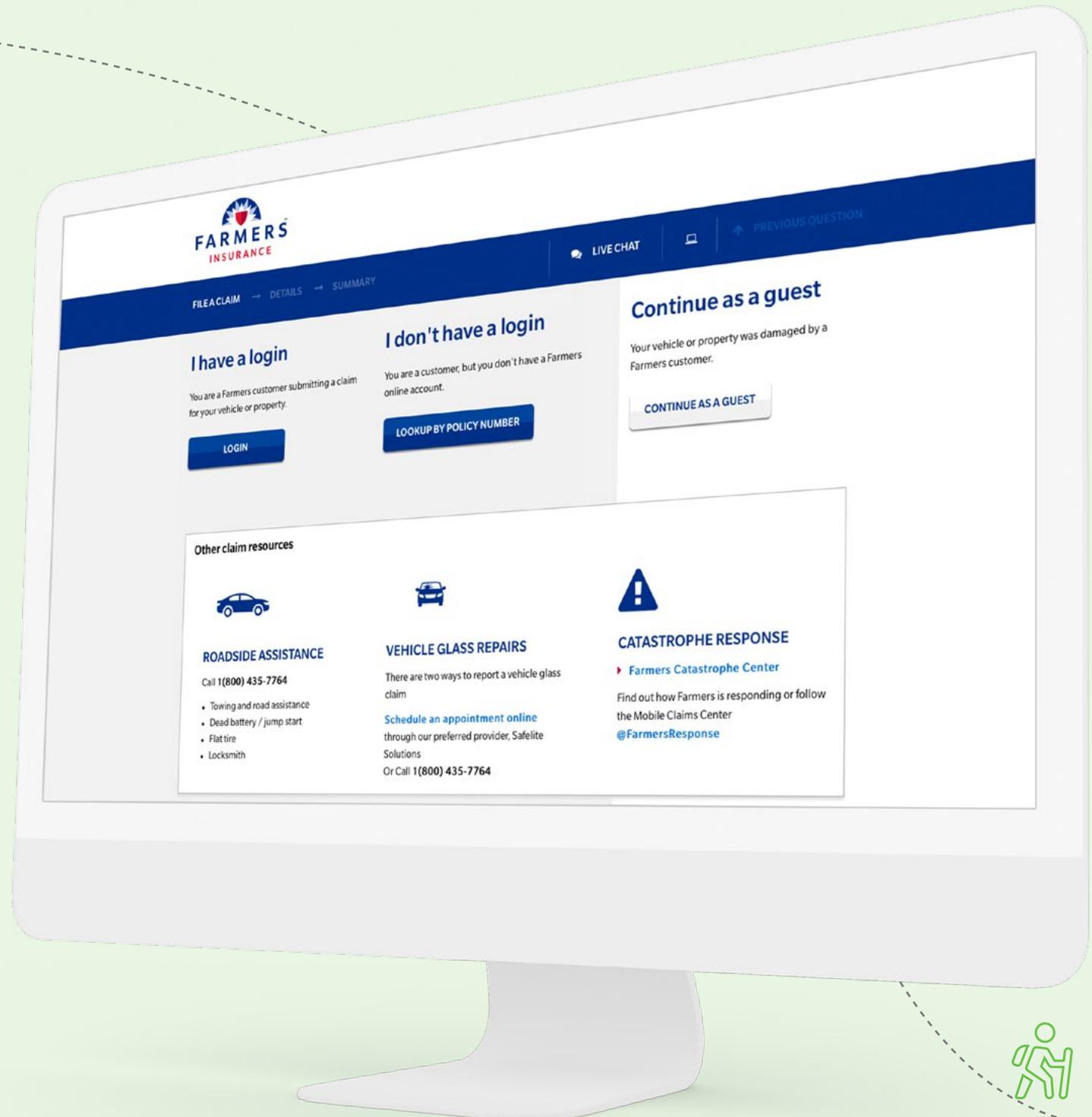
The CSS app also features the Farmers Enterprise First Notice of Loss (EFNOL) tool, which streamlines the reporting of claims, making the process simple, seamless, and efficient. After reporting their claims, customers can also use EFNOL to schedule needed services, such as rentals and emergency assistance. The EFNOL tool, which was rolled out to Farmers Insurance agents and customers, has received very positive feedback. Farmers Insurance continues to improve the app to meet the needs of its customers.



“Our efforts in the area of technology innovation, like EFNOL for example, are driven by our ongoing commitment to improving the customer experience with Farmers,” said Amanda Reiersen, Head of Digital. “Technology will never replace the importance of human interaction, and the relationship between a Farmers agent and the customer remains paramount.”

19 million+
individual policies in
the United States

48,000+
exclusive and independent
agents



How a small IT team built an app that **delivers credit decisions, fast**

OneUnited Bank is on a mission to be the premier banking institution for low-to-moderate-income urban communities. The Boston-based bank has seized the opportunity to establish a national footprint online using Salesforce.

When OneUnited Bank's five-person IT team needed to develop a secured credit card product for customers whose credit ratings had suffered during the recession, they turned to Salesforce. The team had little time – and no extra resources. The non-negotiables: The solution needed to be scalable, trusted, secure, and easy for a small team to build and maintain.

CIO Jim Slocum did his due diligence before deciding on Salesforce for this new initiative. "I was looking at the standard list of partners that I would normally turn to," he said. "Every single one of them said we were doing something no one else was doing and that what I was asking for would take six months."

Fortunately, Slocum was not only able to help his team rise to the occasion, but even go above and beyond – thanks to the help of Salesforce. Leveraging Salesforce Service Cloud, which they had deployed in 2006 to handle an influx of new customers joining the company's online channel, team members used solutions from the Salesforce Platform to build the UNITY Visa Secured Credit Card app. This app features dynamic forms, lead tracking, and tight integration with back-end credit systems.

"We launched the UNITY Visa program in 90 days – half the time of the competition's quotes," Slocum said. "It was incredible."

It was a success not just for Slocum's team and OneUnited Bank's customers, but for the whole organization. In fact, after the launch, when OneUnited Bank's President Teri Williams returned from a trip to Europe with the Salesforce1 Mobile App installed on her iPad, she was so up to date on the UNITY Visa's progress that she recommended





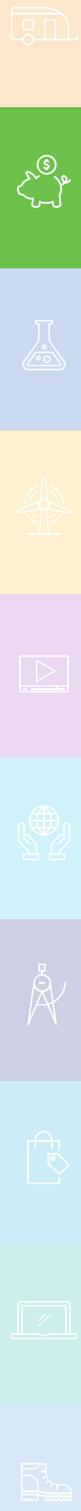
adjusting the approval criteria because too many good applications were being denied. “It was very clear to me,” said Slocum, “that she had spent her overseas trip deep in the Salesforce1 Mobile App, checking out every dashboard and every report on our program.”

Since then, Slocum said he and his team have been working to transfer all OneUnited Bank’s legacy applications onto the Salesforce platform.

“We started to build more and more data about our customers into Salesforce so we could have that single pane of glass, that 360-degree view everybody is looking for. And it has transformed our business.”

– Jim Slocum, Chief Information Officer

90 days
from idea to app



From painstaking to paperless – how one company **reimagined** **wealth management**



Today's consumers are using technology to simplify, measure, and engage in every aspect of what they do. United Capital reimagined wealth management and the role technology plays within it. Over the past decade it has transformed the wealth management process, creating custom applications, all built on the Salesforce Platform, that fundamentally improve the lives of thousands of clients by giving them genuine control over their financial life through a proven system.

The company's Financial Life Management process and tools provide over 80 United Capital offices across the country with a digitized method for interacting with more than 17,000 clients. "We wanted to change the client experience from the 'yellow pad' to the iPad and provide a dynamic and collaborative approach", said Mike Capelle, Head of



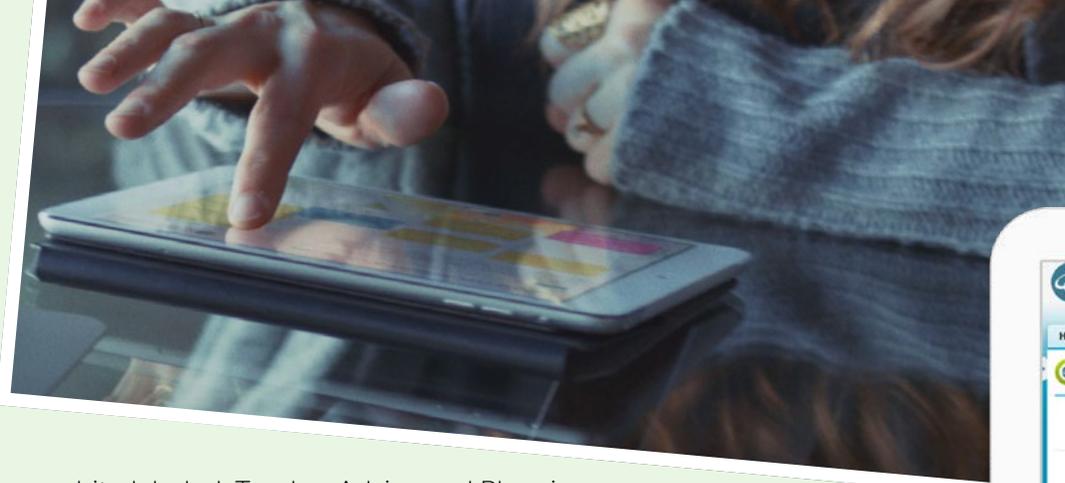
Platform. From this idea, the team created various apps including the Money Mind® Analyzer, Honest Conversations®, Investment Viewfinder, and an interactive reporting app with the GuideCenter.

The team at United Capital developed the GuideCenter to provide clients a single lens into their entire financial lives. Built on the Salesforce Platform, it is a central point of access to other proprietary United Capital tools that help clients define life priorities, determine portfolio preferences, and make spending decisions using real-time information.

"We feel it is our responsibility to help the best advisors in the industry demonstrate their value in this new world," said Joe Duran, Founder and CEO.

Financial Life Management tools and processes offer advisors a repeatable and consistent approach. From discovery to discipline, they help advisors run a paperless organization, with Salesforce at the hub. As the first and largest national financial life management firm in the United States, United Capital's digitized client experience and middle office is now available



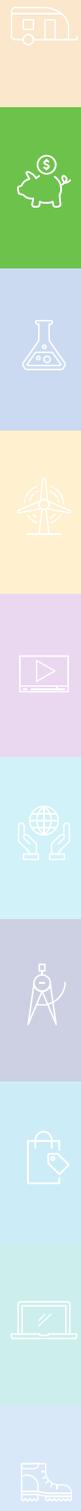
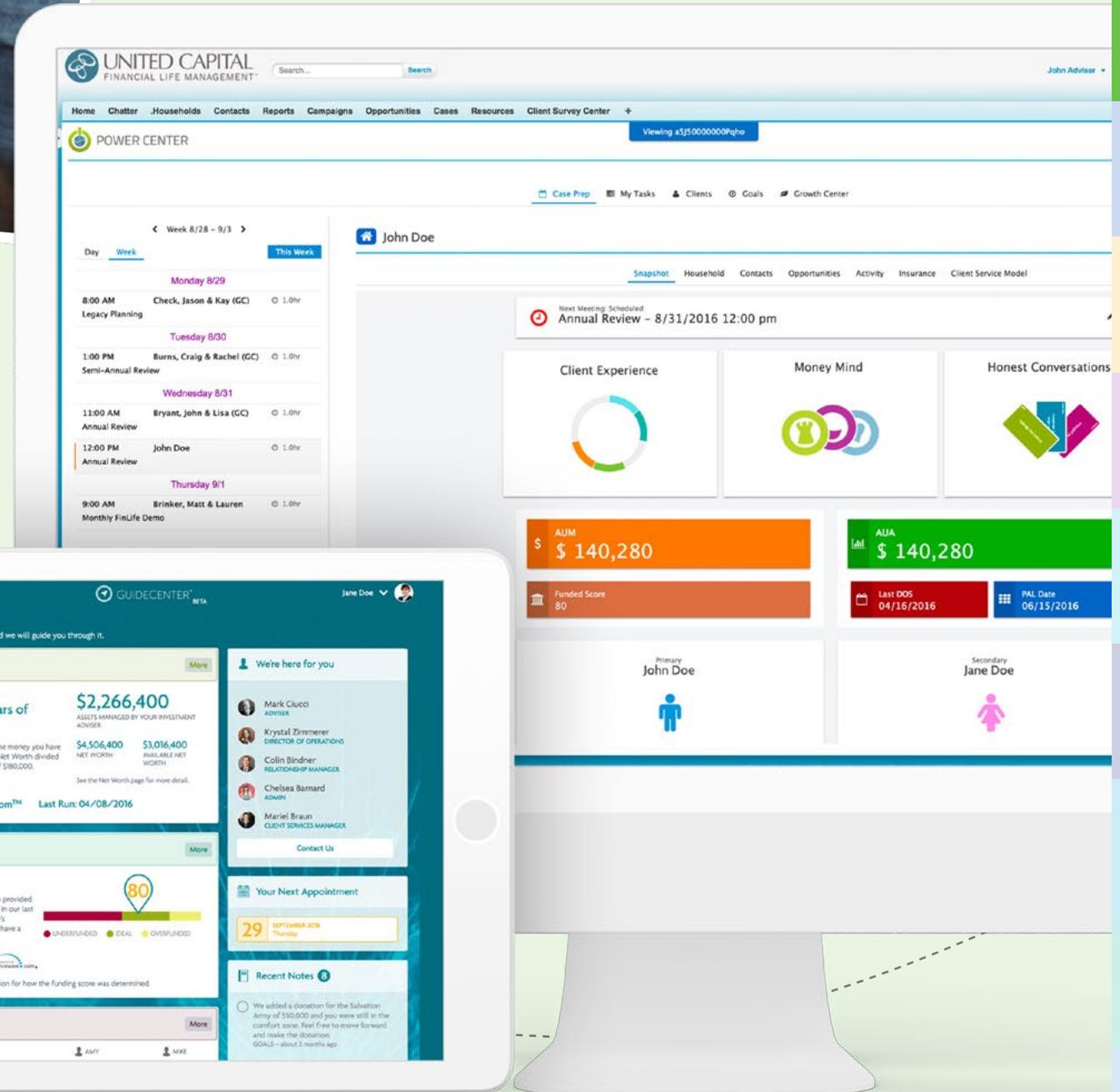


as a white-labeled, Turnkey Advice and Planning Platform for select independent advisory firms.

“Our system strives to deliver spectacular results in both client satisfaction scores and individual office performance, and we know we can help beyond our own ecosystem. That is why we are offering our advice platform to advisors who share our client-centric and forward-leaning view of the world.”

– Joe Duran, Founder and CEO

17,000 clients

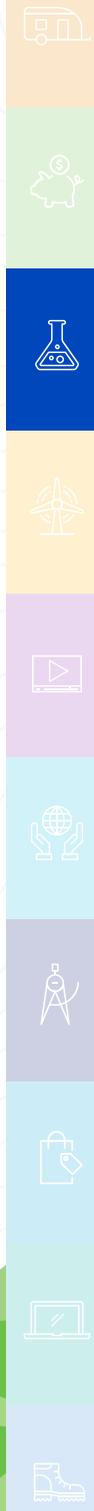




How trailblazers are accelerating scientific breakthroughs with apps

Healthcare and life sciences organizations are at the forefront of technological medical advances, but concerns about the confidentiality of patient records and strict government regulations have hampered efforts to overhaul outdated administrative systems. Yet this is where the real breakthroughs in medicine and life sciences are coming from.

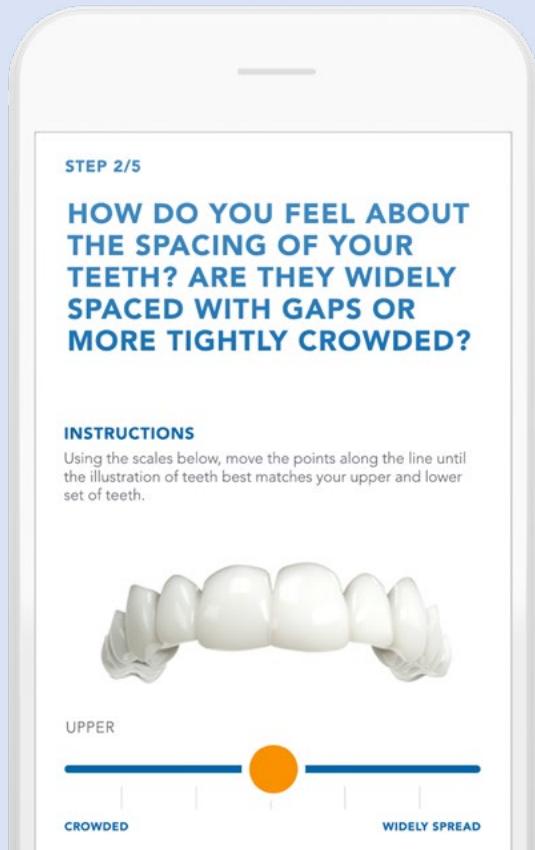
Now, trailblazers in the medical and life sciences fields are securely moving patient records and data from the hanging file to the smartphone and tablet. The ability to access up-to-date information on any device and get a 360-degree view of the patient's medical records is already revolutionizing the industry. And in life sciences, apps that leverage the smartphone's ability to monitor vital signs are transforming medical research. This convergence of science and technology is creating seamless journeys for patients, colleagues, and industry salespeople that improve patient care, speed research, and keep a lid on rising costs.





FOUNDED 1999 | SIZE 5,300 Employees | LOCATION San Jose, CA | WEBSITE invisalign.com

Between visits – **how apps fill the gaps** and keep patients smiling from start to finish



There may not be another company on earth that has helped create more bright smiles than Align Technology, makers of the Invisalign system, the world’s leading clear aligner system – which provides an alternative to metal braces. Having treated more than 4 million people since Invisalign’s introduction in 1999, Align runs all of Invisalign’s consumer-facing apps on Heroku from Salesforce in multiple languages in more than 90 countries.

The Invisalign Smile Assessment app provides a personalized assessment with sample images of patients with similar issues whose smiles were improved after treatment. Used by thousands of consumers each month, the app can require almost daily updates, ranging from small changes on individual documents to very large iterations. In 2012, Align’s IT team faced increasing difficulties

updating the app quickly, which posed problems for both developers and the company’s business teams. That year, the team moved all consumer-facing apps to Heroku – having considered and rejected an alternative infrastructure-as-a-service approach – and is now enjoying Heroku’s management and support services. “I don’t need to worry about patching, adding additional storage, or security vulnerabilities,” said Leela Parvathaneni, Director of Customer-Facing Applications.

Invisalign’s other consumer apps include a cost calculator and a doctor locator. Invisalign providers can also view a patient gallery app with before-and-after photos of satisfied Invisalign patients. Heroku provides Align apps with fast scalability in response to heavy traffic or other issues, so the apps offer an optimal customer experience.

 **“Salesforce has enabled us to more rapidly meet the changing needs of prospective patients and launch content updates at a quicker pace.”**

– **Kamal Bhandal**, *Director of Consumer Marketing for North America*





Align's developers have easy access to more than 150 add-ons in the Heroku ecosystems, including databases, bug tracking, email automation, and other monitoring tools. Freed from tasks such as managing servers, adding memory, upgrading software, and troubleshooting security issues, Align's IT team can focus its time and attention on improving the performance of the company's apps – and bringing more smiles to the faces of consumers.

4 million
Invisalign patients

The screenshot shows the Invisalign Cost Calculator interface. At the top, there are navigation links: "FOR PATIENTS | FOR DOCTORS", "HOW INVISALIGN WORKS", "WHY INVISALIGN", "INVISALIGN FOR ADULT & TEENS", "COST", "HOW DO I GET IT", and "FIND A DOCTOR: ZIP GO". The main heading is "INVISALIGN® COST CALCULATOR".

HOW MUCH DOES INVISALIGN® COST?
The cost of Invisalign treatment is comparable to the cost of metal braces, and in the U.S., can range from \$3,000 – \$8,000. As with other medical treatments, only your doctor can determine the actual cost based on your specific needs and will work with you to customize your individual plan. Other factors contributing to your cost may include the complexity of your individual needs, how long you are in treatment, where you live, your doctor's experience level, your orthodontic insurance coverage, and additional factors determined by your orthodontist or dentist. In some cases, complex treatment needs may result in costs that exceed the range above.

INVISALIGN COST CALCULATOR
Estimated monthly payment, based on the info below.

\$63 (12 MONTHS, 18 MONTHS, 24 MONTHS)

TREATMENT COST
The cost of Invisalign treatment is similar to that of traditional braces. Consult with an Invisalign-trained doctor to determine the cost of treatment based on your geography and the complexity of your case.

PAYING FOR INVISALIGN TREATMENT
INSURANCE
Insurance plans may cover up to \$3,500 of Invisalign treatment.

A progress bar shows a range from \$0 to \$10,000, with a marker at \$5,000 and a box labeled \$5,000. Below it, a box labeled \$2,500 is shown.





FOUNDED 1876 | SIZE 37,925 Employees | LOCATION Indianapolis, IN | WEBSITE lilly.com

This healthcare concierge app **gives** patients the care and attention they need, day or night.

A new era of highly specialized medicine is upon us, one in which patients need more training and support to administer medications and stay on therapy. Global pharmaceutical maker Eli Lilly offers that support in part through a mobile healthcare concierge app, built with the Salesforce Platform.

Specialized medications that treat such chronic conditions like psoriasis, arthritis, and osteoporosis have long required greater levels of patient support than medications in pill form. Healthcare providers traditionally have delivered patient support through call centers and home visits from nurses. But because many of these services

were outsourced, Eli Lilly had poor control over the quality and reliability.”

The customer experience was suffering,” said Richard James Carter, Director of IT. “There was limited control and insight over the data, due to multiple vendors and systems of reference.”

With the Patient Connect Platform app, which went live in October 2015, Eli Lilly has reimagined patient care by helping customers learn how to use products, access information about their medications, and answer online surveys that record how well patients are feeling, physically and emotionally, on a daily basis. The desktop and mobile app also help patients engage with a personal healthcare concierge, a support specialist matched with each patient who help the patient reach their targeted outcomes through their course of therapy.

Eli Lilly has built more than 50 apps on the Salesforce platform, innovating all across the organization. The company has built manufacturing controls apps, citizen developer apps, and enterprise apps for its employees.





“IT is now not the roadblock. It’s the business. IT wants to be solving business problems.”

– Richard Carter, Director of IT

Thanks to agile methodologies and a minimum viable product approach, the Salesforce Platform development process at Eli Lilly can transform an idea into an app in under seven weeks.

As a company, Eli Lilly is betting that this approach represents the future direction of healthcare. “We wanted to differentiate ourselves from our competitors,” said Carter, regarding the Patient Connect Platform.

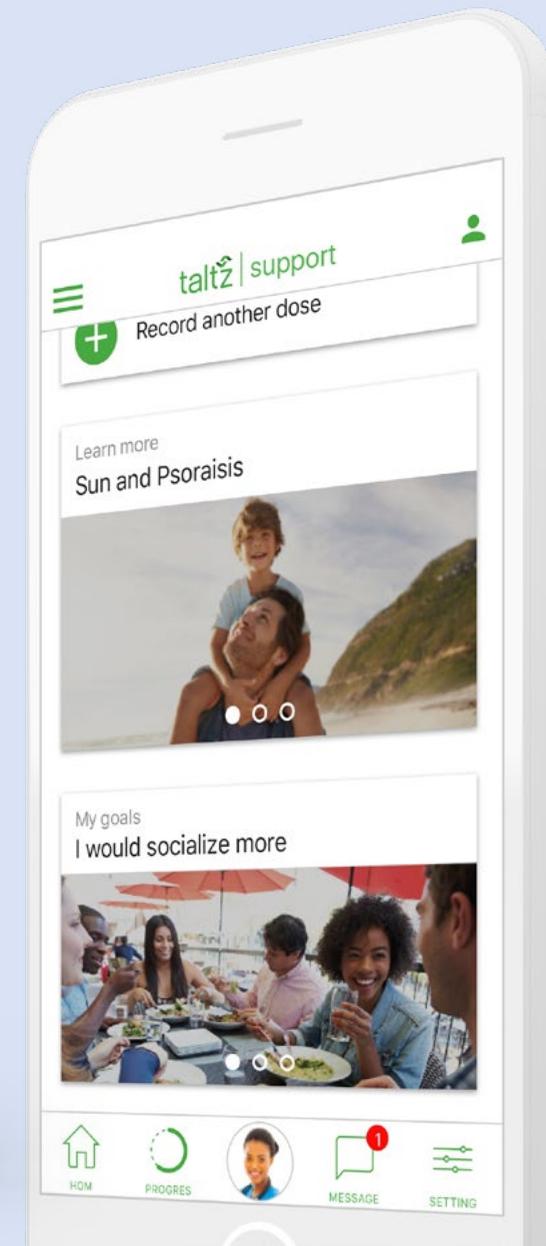
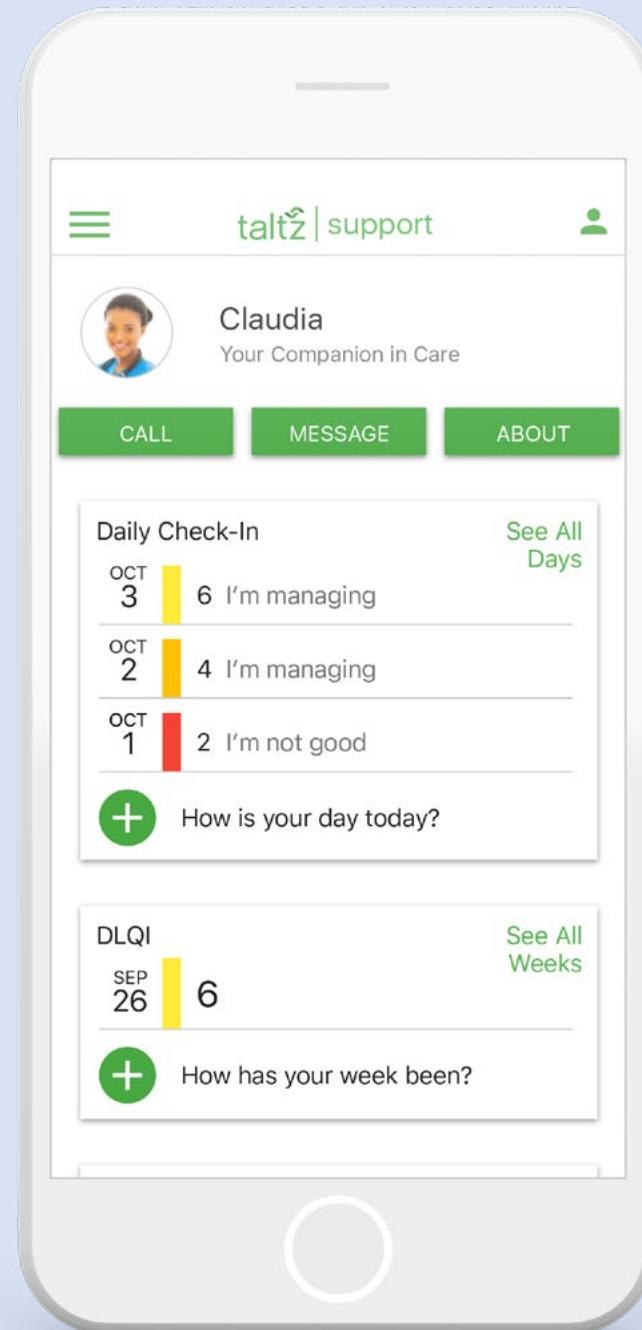


“We knew that our future product portfolio would demand more of these services.”

– Richard Carter, Director of IT

50+ apps
built on the
Salesforce Platform

7 weeks
from idea to app





FOUNDED mid-1970s | SIZE 500 Employees | LOCATION Ipswich, MA | WEBSITE neb.com

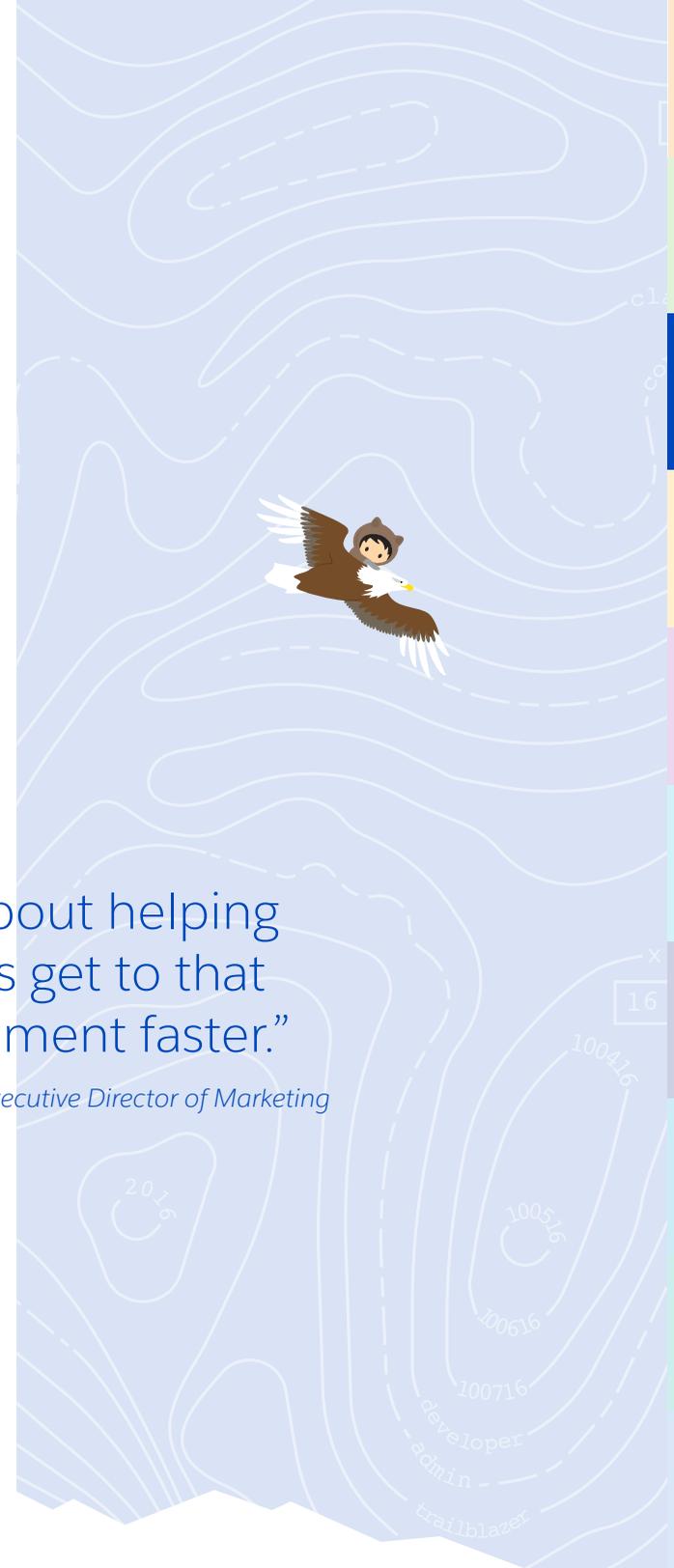
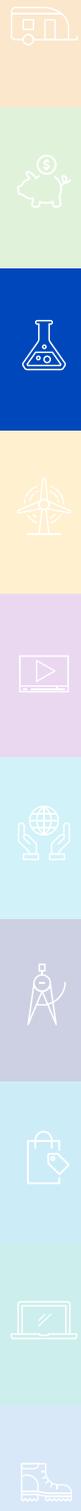
A collective of scientists finds new paths to **unravel the mysteries of DNA in the lab faster.**

In a world where people expect a ride to show up just a few moments after they order it with the tap of a finger on a smartphone, is it any surprise that life sciences researchers are under tremendous pressure to discover breakthroughs faster than ever?

As unreasonable as it seems, it is just such changing expectations that have become the norm in the Age of the Customer. For New England Biolabs (NEB®), the very technologies that have made people less patient for answers have also turned out to be the solution. In fact, with the Salesforce platform, the team at NEB is able to quickly create and deploy social and mobile apps that allow scientists in laboratories around the world to get the precious materials they need for experiments – all with a higher degree of convenience and support than ever before.


“We’re all about helping researchers get to that eureka moment faster.”

– **Andrew Bertera**, Executive Director of Marketing



THE BUSINESS CHALLENGE

Deliver inventory faster so scientists can **innovate faster**

Because NEB offers the largest selection of recombinant and native enzymes for genomic research, one of its biggest business challenges is ensuring that the right products are available to researchers when and where they need them.

One solution was simple: Put NEB freezers in labs around the world stocked with the materials scientists in those labs require. However, while this freezer program allowed NEB's customers (scientists in labs across the globe) to access products more easily, it still left NEB in the dark about which specific scientists were using which samples, and how often.

Essentially, NEB still did not know their customers deeply enough.

Framed this way, you might expect a customer service group, or even a sales group, to be tasked with finding a solution. But because NEB was using Salesforce already, another group was able to step forward and take a leadership role in the business: IT.

Of course, solving this problem posed a number of issues for the team, who was also tasked with:

- Ensuring secure/direct access to products in labs
- Delivering transparency and real-time metrics, while reducing operational IT liabilities and costs
- Delivering excellent customer service and collaboration across all technical mediums
- Integrating and connecting custom point-of-sales freezer kiosks that could also ensure quality control for products



“We began to think, what would our freezers tell us if we connected them into our Salesforce environment. How could that help us to become more responsive to our customers,” said Ken Grady, former CIO at NEB.



THE AHA MOMENT

A hotel minibar **inspires a global solution**

In 2012, the New England Biolabs team went to Dreamforce and observed what other companies – like GE, with its connected engine – were doing with Salesforce. But the IT team still wasn't sure what to build or connect, or even how to leverage the platform more aggressively to be more responsive to customers. Until, that is, team members went back to the hotel to relax and found the answer in their minibar: If the hotel could track the products they were pulling from the minibar, why couldn't NEB's freezers track what scientists were purchasing?

Taking another look at the Salesforce Platform, with its APIs and solutions like Heroku, the team found that developing an interactive freezer model would be faster than a more traditional model. In fact, it took only a matter weeks, rather than months, to iterate and integrate the new model.

The APIs from the Salesforce Platform made it possible to do things that no other platform could.

In fact, using the Salesforce Platform, NEB started by building a custom inventory app in less than 30 days. This app, residing on a tablet on the front of each freezer, allows scientists to authenticate themselves, view available products, open freezers, and scan products for checkout. Every step of this process is automated and connected on the back end to Salesforce, where NEB can monitor the products being purchased, send automated purchase confirmation emails, and track new buying trends and interests of scientists in real time on their desktop or the Salesforce1 Mobile App.

NEB could also capture customer interaction data, freezer temperature, and lock status, to ensure product quality, which was something the company could never do before.

Additionally, NEB connected Salesforce to its own back-end systems and automated inventory replenishment through its existing ERP system to consistently provide scientists with the products they need on a daily basis.

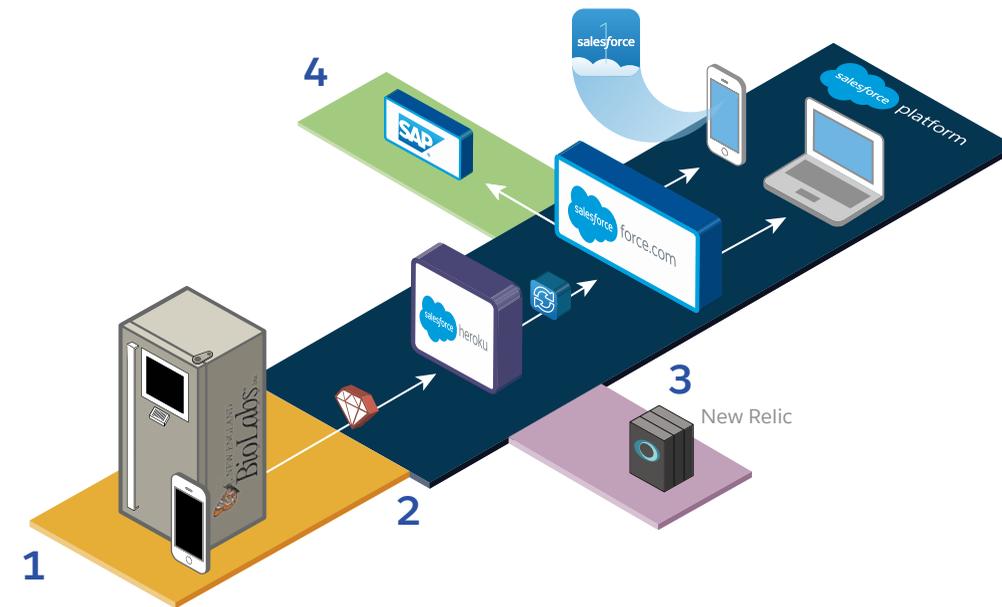


A closer look at the **architecture and technology** that made the NEB solution successful

For NEB, the Salesforce Platform offered a complete set of services to create every piece of the solution, including a secure and trusted way to connect it all. From the foundational elements to build on, to the tools to build with, integrate, and manage, Salesforce gave IT all that was required to help drive the business forward, faster.

1 | An NEB freezer stocked with its products is located in a customer's laboratory. On-site, scientists use the tablet mobile user interface on the freezer to authenticate themselves, and the freezer is then triggered to unlock. Scientists can then view inventory categories and check out or purchase inventory.

2 | The scientist's purchase and interaction history is then transferred via Ruby on Rails into Heroku. It is then recorded and synced into Salesforce via Heroku Connect.



3 | Heroku allows New Relic to alert NEB of any app performance errors. And Salesforce sends a purchase receipt to the scientist via email.

4 | Once the transaction is synced to Salesforce, NEB employees can view and track customer interactions or trends and adjust inventory in real time from their desks. Additionally, NEB executives can see the data via the Salesforce1 Mobile App from anywhere, gathering insights from dashboards to see which products were profitable, what was purchased, and how to optimize for inventory.





The **Salesforce services** NEB used to build its app solution

Heroku and Heroku Connect

NEB built a customer-facing app with Heroku to connect with customers in real time. Additionally, using Heroku Connect, data was automatically synced inside Salesforce, creating a 360-view of New England Biolabs' customers (scientists, labs, and universities) and product purchasing trends.

Custom Schema

New England Biolabs created a total of 87 custom objects, 13 custom apps, 35 lines of Apex code, and 48 Visualforce pages. Accounts and contacts were among the basic out-of-the-box Salesforce features used; however, certain objects and fields were customized to map to NEB's specific customer set. For example, the "Accounts" object was changed to a "Freezers" object because freezers are sub accounts of the university. Similarly, "Contacts" changed to "Universities," and custom actions, like freezer cases, were created.

AppExchange Apps

NEB has also installed multiple AppExchange apps to extend its Salesforce capabilities.

Pardot and Form Assembly

These generate email and web form communications to NEB's customers.

Conga Courier

This app schedules and automatically emails numerous Salesforce reports to employees and customers.

DupeCatcher

This app cleanses and removes duplicate records from the NEB database and mass imports.



Workflows

Overall, NEB uses a wide range of workflows to:

- Send welcome emails when new users register
- Open the freezer door for 20 minutes when a new user requests access
- Monitor freezer temperature to ensure product integrity

There is also a workflow that sends NEB an email notification when product inventory is low to trigger restocking.

Authorization, Security, and Compliance

The New England Biolabs IT department has control of over 34 profiles and 36 permission sets to give employees and scientists access to certain tools and functions within Salesforce. There is no external sharing and there is controlled and restricted IP access to keep information secure.

APIs & Integration Services

REST and SOAP APIs are used to access, modify, and report in Salesforce, and to generate notifications of changes. APIs integrate and pull data from NEB's SAP ERP system.

Chatter

Tech support uses Chatter to better help users with technological issues. More than just a collaborative tool, Chatter is also used for communications to NEB sales staff.

Analytics

Analytics is built into Salesforce and helps New England Biolabs keep tabs on key business metrics like adoption, case metrics, company performance, and sales pipeline management. Reports and dashboards provide new views of data to make managing freezer assets and turnovers, in-stock versus nonstock orders, restocking, and distributor metrics, simpler, easier, and faster.

Salesforce1 Mobile App

Salesforce data is pushed to mobile devices to enable employees to manage inventory on the go. Apps, dashboards, and reports on enzyme sales, freezer status, inventory needs, order status, and more, are all available anywhere through the Salesforce1 Mobile App.



The benefits of **building with Salesforce**

For NEB, building on the Salesforce Platform has enabled the IT department to be a true business driver for the company, transforming the way that NEB serves the scientific community.

For IT

The IT department received real benefits from the implementation that included:

- Minimal change in IT costs. By leveraging an existing platform (Salesforce), the IT department was able to design a solution that leveraged its existing skills, as well as architecture. No new resources were needed.
- Size of the team that built the app: 0.5 internal FTE + 1.5 external developers, + 1 project manager. Plus supporting cast and crew from the marketing team (wrap design for the freezer, icon design, UX, etc.).
- Speed to build: v1.0 design/build took less than 100 days.
- Reduction in total project time. What would have taken 6–12 months to build and deploy with another architecture, took just months. The overall reduction was at least 75% in build/deployment time.



For Business

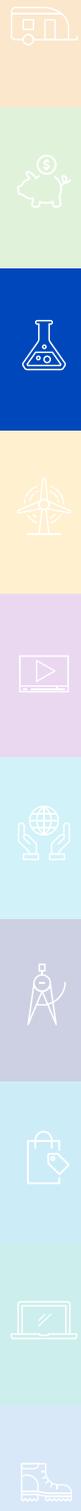
NEB made richer, deeper connections with customers by giving scientists:

- Visibility into product availability and location.
- A secure and fast way to check out the products.
- The ability to go online via desktop or mobile devices to view inventory prior to leaving their desks.

NEB business stakeholders ensured satisfaction, loyalty, product integrity, and further sales with insights from:

- Real-time visibility into the products of interest and buying trends of scientists.
- A centralized place to view freezer and customer data.
- Faster response times to customer requests and agility based on information they receive in real time via Salesforce.





“ It’s not that we built a bunch of separate apps and integrated them into Salesforce. We built directly in Heroku and leveraged our Salesforce objects in real time. That made our development approach much, much quicker, cheaper, and easier.”

– **Ruben Melo**, *Senior Business Systems & Applications*

New intranet encourages **healthy collaboration** at hospital network.

For many years, employees at St. Joseph Health were struggling with internal communications. A nonprofit hospital system with 14 hospitals in three different western states, St. Joseph Health did have an intranet, but employees found it clunky and hard to navigate; therefore, they all but ignored opportunities to communicate via the channel. Now with the introduction of Staffhub, a mobile social intranet powered by Salesforce, 18,000 St. Joseph Health employees are communicating and collaborating like never before.

Staffhub began as a pilot project to replace a legacy intranet that had only 100 active users, and only four individuals who could be considered “power users.” Built on Force.com, Staffhub integrates Community Cloud and Chatter with LinkedIn and

grew mainly by word of mouth after a soft launch with just 50 users. “People started to talk about it,” said David Baker, Vice President of IT. “They’d ask, ‘Can we jump on? Can we explore?’ And we’d say, ‘Sure, play around with it. See what you think. Give us your feedback.’”

Those 50 users quickly grew in number to 3,000 just a few weeks after the soft launch. Within months, there were 18,000 users, including vice presidents and CEOs who have become regular contributors.

 **“Social media is coming whether you like it or not. There’s no way to fight it. We realized that we needed to get in front of it, embrace it, and use it as a tool to promote our company culture.”**

– David Baker, Vice President of IT

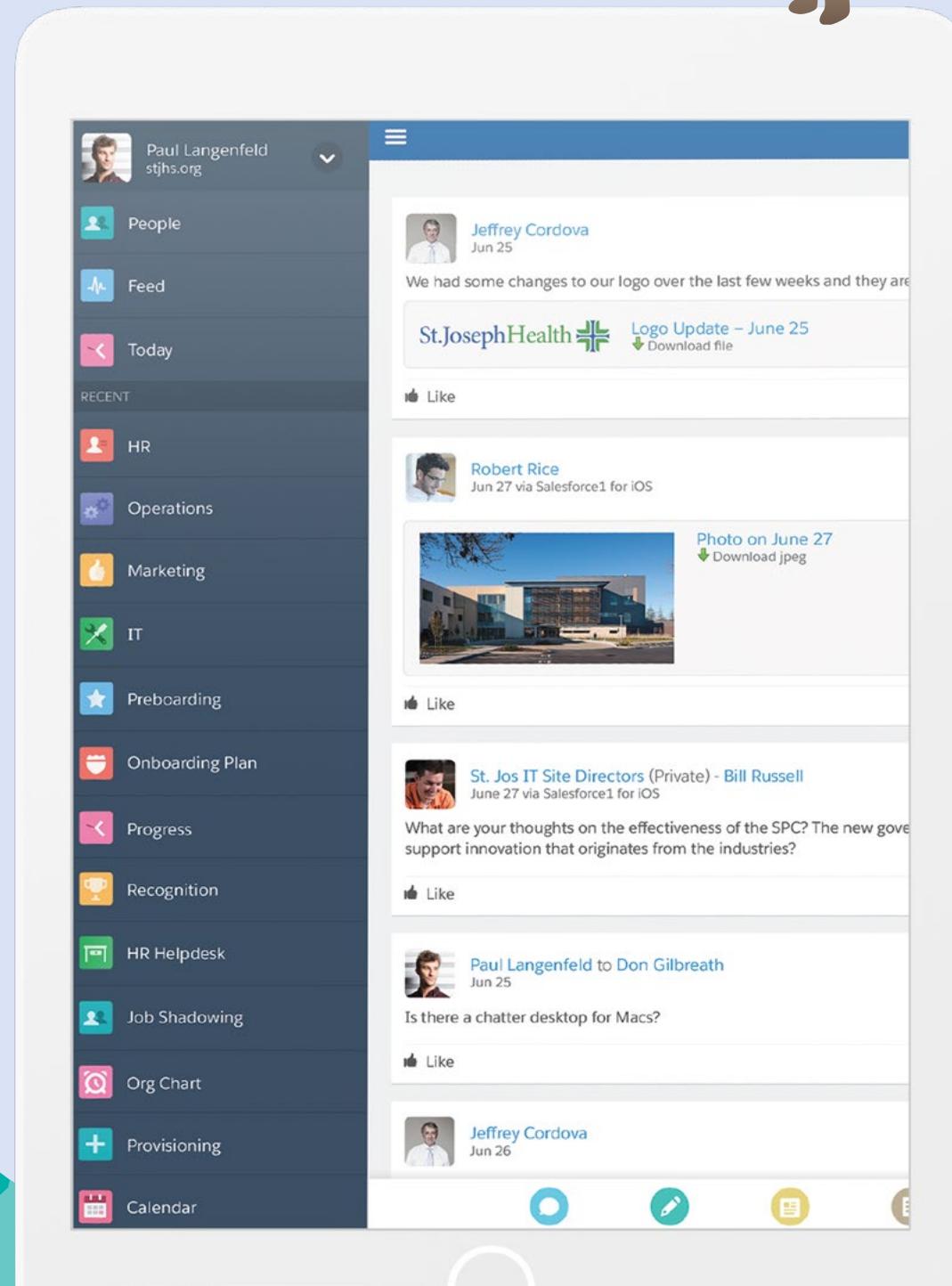
Staffhub has even helped Baker’s own department better manage its daily onslaught of 1,200 to 1,500 service calls. Now that there’s a 24-hour Ask IT app plugged into Staffhub, tickets for service can



be generated right away. “The beauty is that there is open collaboration and searchable content,” explained Baker, “so though the tickets are being raised, sometimes the problem is solved by one of the members of the service desk team before the ticket is even allocated.”

One noticeable mark of Staffhub’s success is that it has broken up the slower-moving, decades-old email communication culture at St. Joseph Health, one in which information was difficult to find and share. “Our tagline for the project has been: ‘Email is where information goes to hide,’” said Baker. “We’re really freeing the data and liberating the information. Folks from Northern California, Southern California, and Texas may not have understood there are other people out there working on similar stuff, and now they can connect. It’s helping us to become a true enterprise company.”

18,000 users





How trailblazers are manufacturing closer relationships with customers

Remember when manufacturers made things? And their future depended on a pipeline of new products? Today's trailblazing manufacturers are turning raw data into valuable new products tailored to their customer's exact specifications.

The key to success is making only what customers want – and delivering it precisely when they need it. That means leveraging more and more data from the IoT, customers, supply chain, and employees to fine tune the manufacturing process for optimal efficiency.

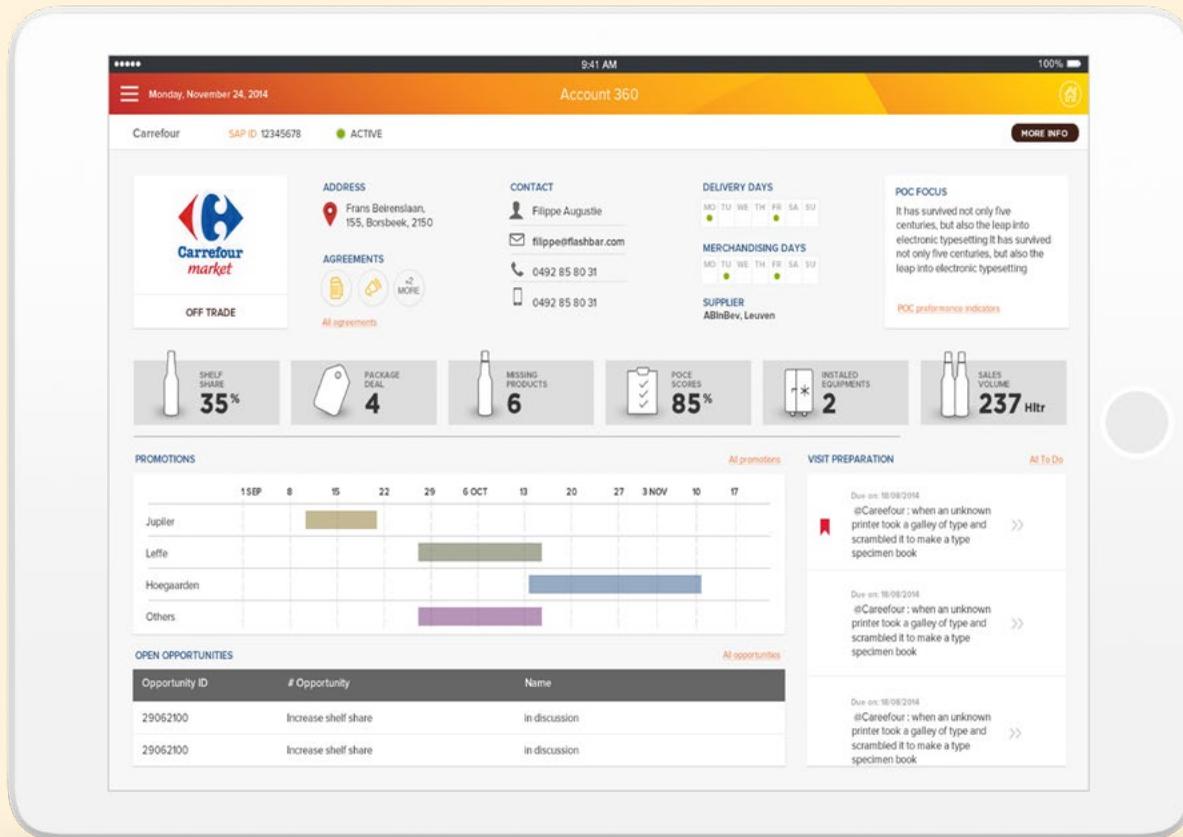
In the following pages, you'll meet a broad range of manufacturers – from traditional businesses to technology upstarts – who are pioneering a new approach to manufacturing that gives them a competitive edge.





FOUNDED 2008 | SIZE 152,000 Employees | LOCATION Leuven, Belgium | WEBSITE ab-inbev.com

A mobile app **boosts productivity** and offers sales reps more time for selling.



When a company has \$43.6 billion in annual revenue, even the slightest inefficiency in sales processes can pose a significant financial shortfall. That's the situation multinational beverage giant AB InBev faced several years ago, before the launch of its Field Sales Execution app with the Salesforce Platform.

AB InBev grew into the world's largest brewer and third-largest consumer packaged goods company through mergers and acquisitions, which left the company with a siloed and fragmented IT landscape. Sales representatives, in particular, were impacted by having to use old and heavy systems that increased their time spent on administrative tasks, putting a drag on their sales productivity.

"Sales reps had to spend a lot of time on administration work rather than doing sales execution," said Vital Potlatov, Senior Business Technologist. "They used old heavy laptops instead of mobile lightweight tablets, leading to inconvenience and higher time of entering data. They couldn't get necessary information in time to do sales execution. They couldn't measure their success. There was simply no business efficiency with their systems."





In 2014, the IT team at AB InBev selected Salesforce for its CRM platform. To create a mobile sales solution that would work with the Salesforce back end, Potlatov and his teammates began consulting with sales teams in a variety of countries in order to understand their processes and requirements. After a year in processes standardization across many countries and development of the solution, the mobile app went live, followed by further fast rollouts every 120 days.

By automating so many administrative tasks that previously had to be done by hand, the mobile app frees AB InBev sales reps to spend more time to engage with customers. The app also enhances strategic capabilities by increasing promotions efficiencies. By December 2016, the app will be rolled out in 10 countries.

“This was the first time I’ve seen so many positive feedback from our sales guys,” said Potlatov. “They love the new tool and we continue to enhance it with even more features.”



“The business demanded a mobile solution.”

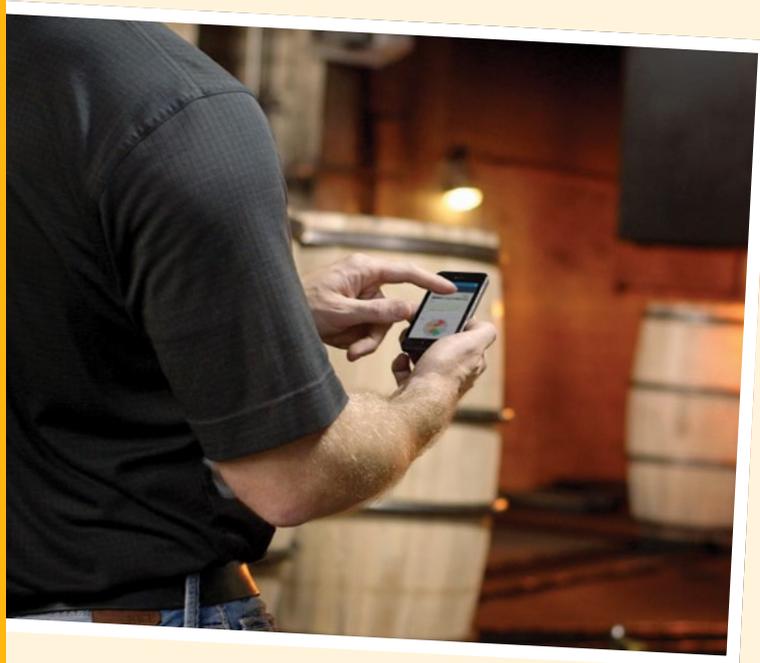
– **Vital Potlatov**, Senior Business Technologist

10-country
rollout for the app
within 2 years

\$43.6 billion
in annual revenue



An authentic spirits company continues a legacy of innovation.



Brown-Forman, maker of iconic brands like Jack Daniel's and Woodford Reserve, built its nearly 150-year-old business on time-honored practices like slow-aging and handcrafted spirits. But its future increasingly rides on harnessing the same technologies transforming businesses everywhere.

Since 2011, Brown-Forman has built dozens of apps on the Salesforce platform. Company leaders chose Force.com because of its ease of use and the way it integrates with everything else. "If you're going to continue to help your company grow, you need to be agile," said Tim Nall, CIO. "Force.com allows us to quickly build something and get it in front of somebody, and then iterate on it rapidly."

One of the first successes was the My B-F app, a mobile social intranet that connects thousands of Brown-Forman employees around the world. Built on Force.com and launched in just three months, it quickly became a personalized hub for collaboration around the world.

Because Chatter is integrated with My B-F, employees can personalize the apps they want to go to and which tabs and information appear at login. "People who sell Jack Daniel's in Germany learn from those who are selling it in Australia and

vice versa," said Nall. "And this can now happen in real time. People can interact and share ideas and information with people they never may have met in the past. And for Brown-Forman, that's extremely powerful."

Building on this experience, Brown-Forman's IT team has delivered innovative apps for employees, distributors, and customers that have empowered its global business in new ways. One example is Wombat, a mission-critical app originally created five years ago as an offline application. Because field reps were often visiting accounts that were far afield, it was important to give them access to core information on their tablets even when they had no internet connectivity.

Today Wombat is being updated as a leaner, more robust mobile app that takes advantage of features like a mapping API to give salespeople a complete view of accounts nearby so they can see which areas to target.

Brown-Forman is also reaching customers directly with programs like the By the Barrel app that invites consumers the opportunity to hand-select their own barrel of special Brown-Forman spirits like Jack Daniel's or Woodford Reserve. Fans can then





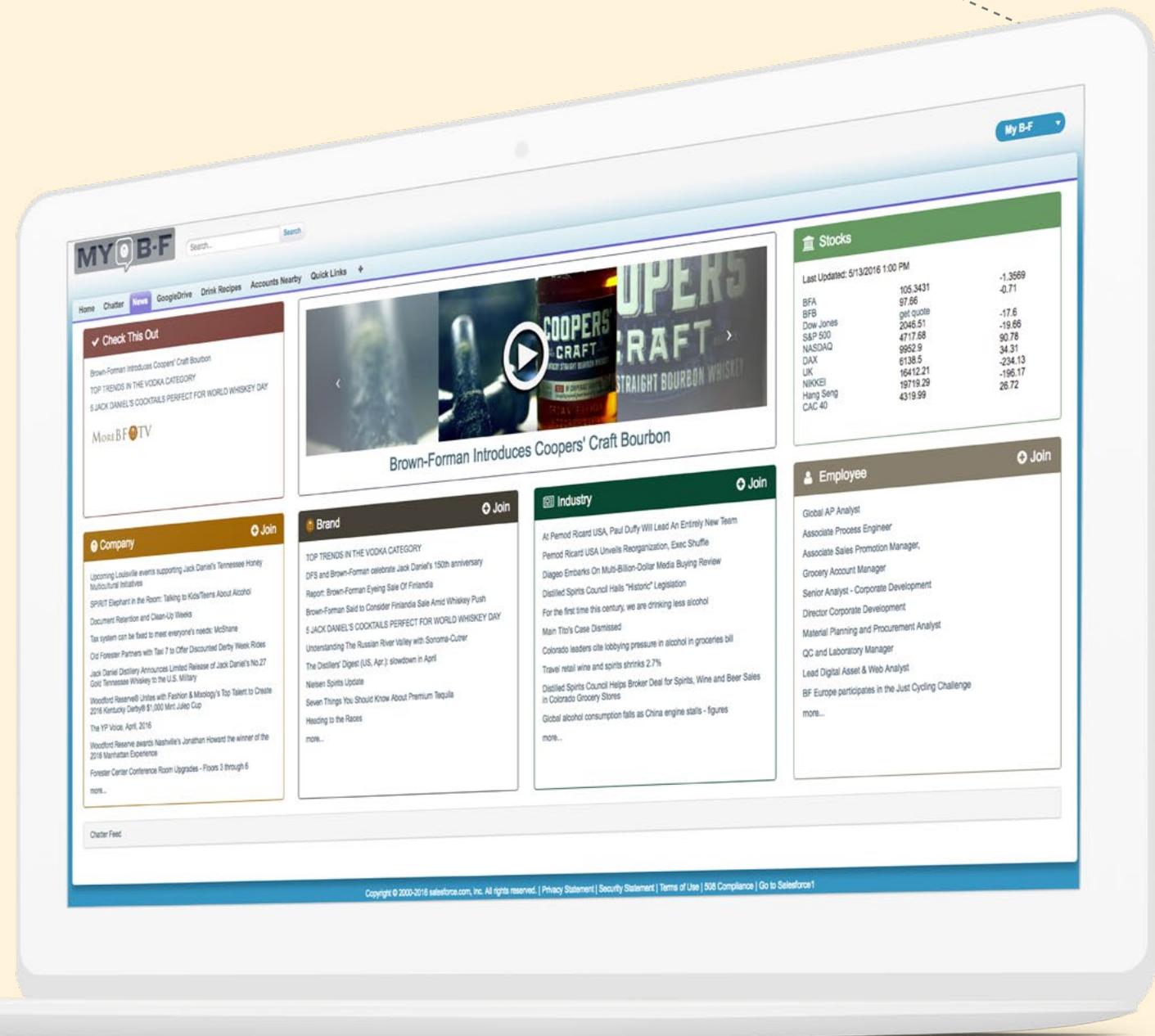
personalize the labels on bottles, receive a detailed provenance, and even keep the empty barrel as a souvenir, complete with an engraved plaque.

So what began as an investment in a platform for building apps has evolved into a companywide strategy that touches on every aspect of the business. “What surprised us was the breadth of what Salesforce offers,” said Nall. “As CIO, I can now add value to our marketing organization, our commercial org, our production org – all by leveraging a single platform.”

 “What Salesforce is allowing us to do is truly partner with the brand teams, bringing them innovative solutions for storytelling and connecting with customers in new ways.”

- Tim Nall, CIO

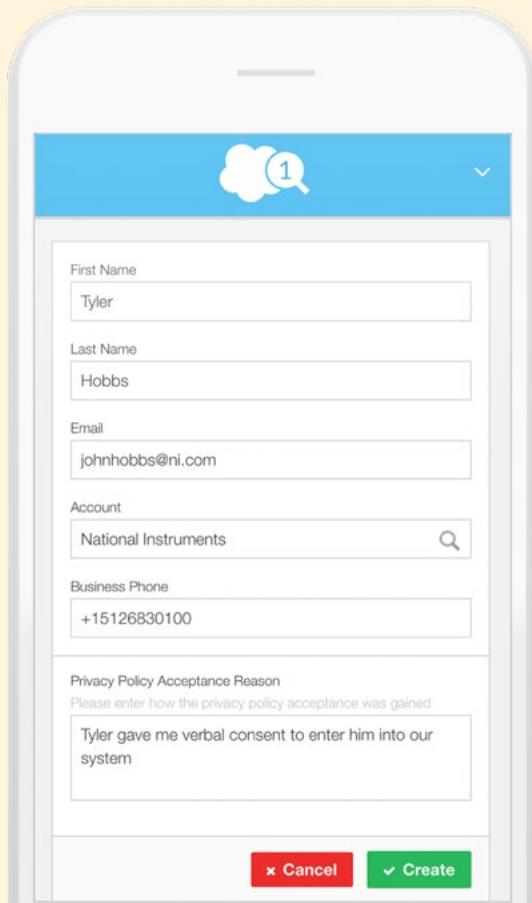
3 months
to develop My B-F
intranet app





FOUNDED 1976 | SIZE 7,000+ Employees | LOCATION Austin, TX | WEBSITE ni.com

Duplicate data **meets its match** in a simple app.



Information is useless if it isn't accurate and clean, which makes data cleansing a common and costly problem for companies migrating their duplicative legacy systems to the cloud. National Instruments, however, has found a clever solution to the data-cleansing problem with OneSearch, a custom enterprise search app built on the Salesforce Platform.

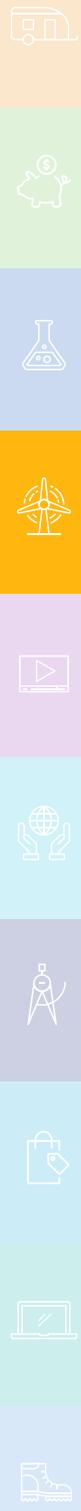
As a maker of automated test equipment and virtual instrumentation software, National Instruments designs, manufactures, and sells systems to engineers and scientists. Its sales department had long managed its accounts on legacy applications that were unable to scale across multiple product lines and geographies, or between departments. The results had sometimes been poor customer service and miscalculated

commissions for sales representatives. When National Instruments began to migrate its data to Salesforce, the company avoided a long, expensive data-cleansing project by developing OneSearch to assist with data deduplication. Thanks to OneSearch, sales representatives can now search, import, and consolidate their own customer accounts from local and external systems, relieving IT of that enormous burden.

 **“OneSearch leverages our master data management solution and allows users to fuzzy search and import customer and account data from external systems.”**

– **Richard Garen**, *Senior IT Applications Manager*

Garen continued, “When you see the contact you want, you can import it into Salesforce if it’s not there.” OneSearch runs searches on two Oracle systems, Salesforce, an e-commerce source, and a user account system on the web. Then it parses the results and shows them to users (on both mobile and desktop) in ranked order.



The app was built by two developers in three to four months and is a full Visualforce app with back-end Apex behind it. OneSearch has granted National Instruments employees full 360-degree views of their customers for the first time, with a resulting rise in customer satisfaction. The sales department also reports that its new ability to work via mobile devices has yielded a 300% reduction in time required to create accounts and contacts.

3x

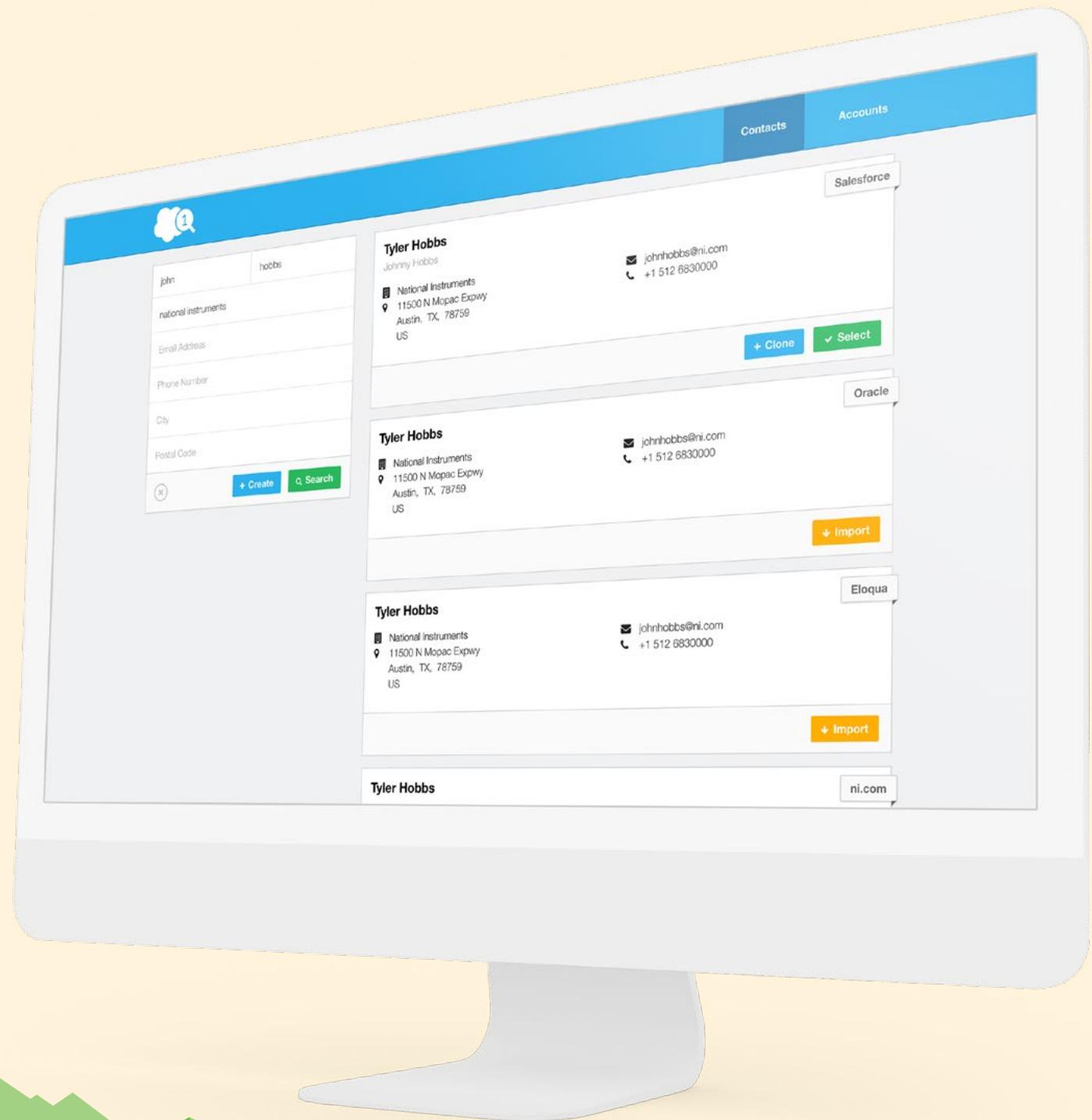
gain in productivity

2 developers

built the app

3-4 months

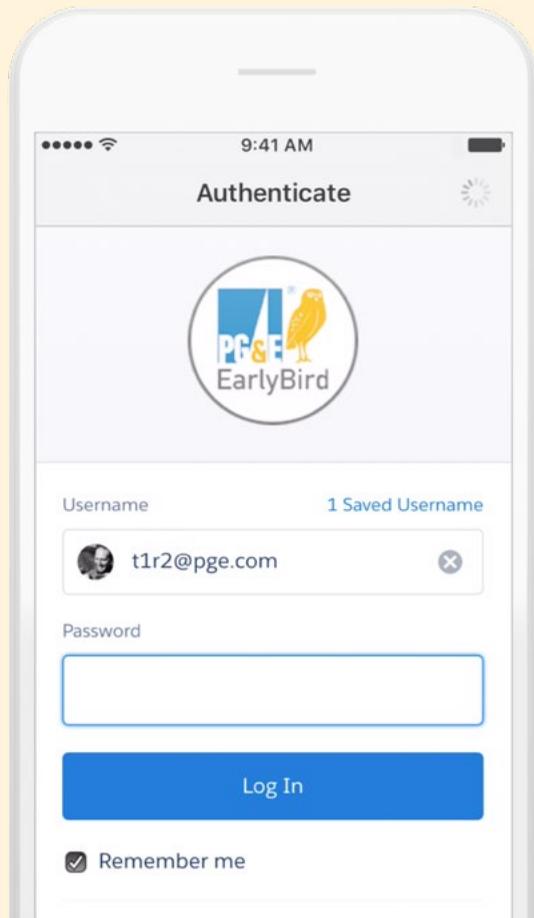
in development





FOUNDED 1905 | SIZE 20,000+ Employees | LOCATION San Francisco, CA | WEBSITE pge.com

A utility company **finds an innovative way** to protect wildlife.



Every year, approximately 250 different bird species make their home in Northern and Central California, the vast service area of electric and gas utility PG&E. Biologists employed by PG&E are using a custom mobile app built on Salesforce to help protect these birds and their nests during construction projects and routine maintenance.

PG&E employs more than 40 biologists to manage wildlife issues for the company and ensure regulatory compliance with the Endangered Species Act, the Migratory Bird Treaty Act, and various state codes related to wildlife and habitat preservation.

Nesting bird surveys are an essential data-collecting activity that PG&E biologists had always done by hand or on spreadsheets.

“Communicating survey results was incredibly time consuming, and it took a lot of coordination to update our project teams on the nests we protect.” said Tyson Read, a biologist at PG&E. “On top of that, we didn’t have an effective way to standardize our data or store it in one place.”

Read and six other biologists worked for eight months with three developers from Salesforce partner Ethos Solutions to build a custom mobile app called EarlyBird. Now biologists can collect and manage all of the data from their nesting bird surveys: species, the location of nests, the time and date of observations, as well as details about nest status. Read estimates that the mobile app saves his team members about an hour for each survey and that Salesforce’s reporting saves hours preparing larger reports that would otherwise be spent creating tracking spreadsheets by hand.

Besides the biologists at PG&E, the EarlyBird app will require a total of 250 licenses to include staff within PG&E’s Environmental Management team and contractors that help collect nesting data. The bird nesting survey app is just a start, as Read said, because “from here we want to expand our system to include all of the threatened or endangered species we protect, such as mammals,



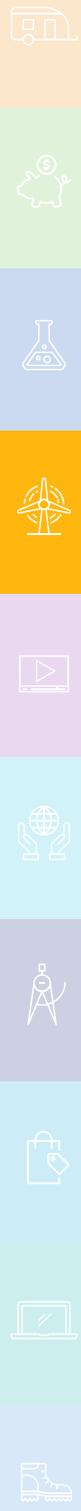
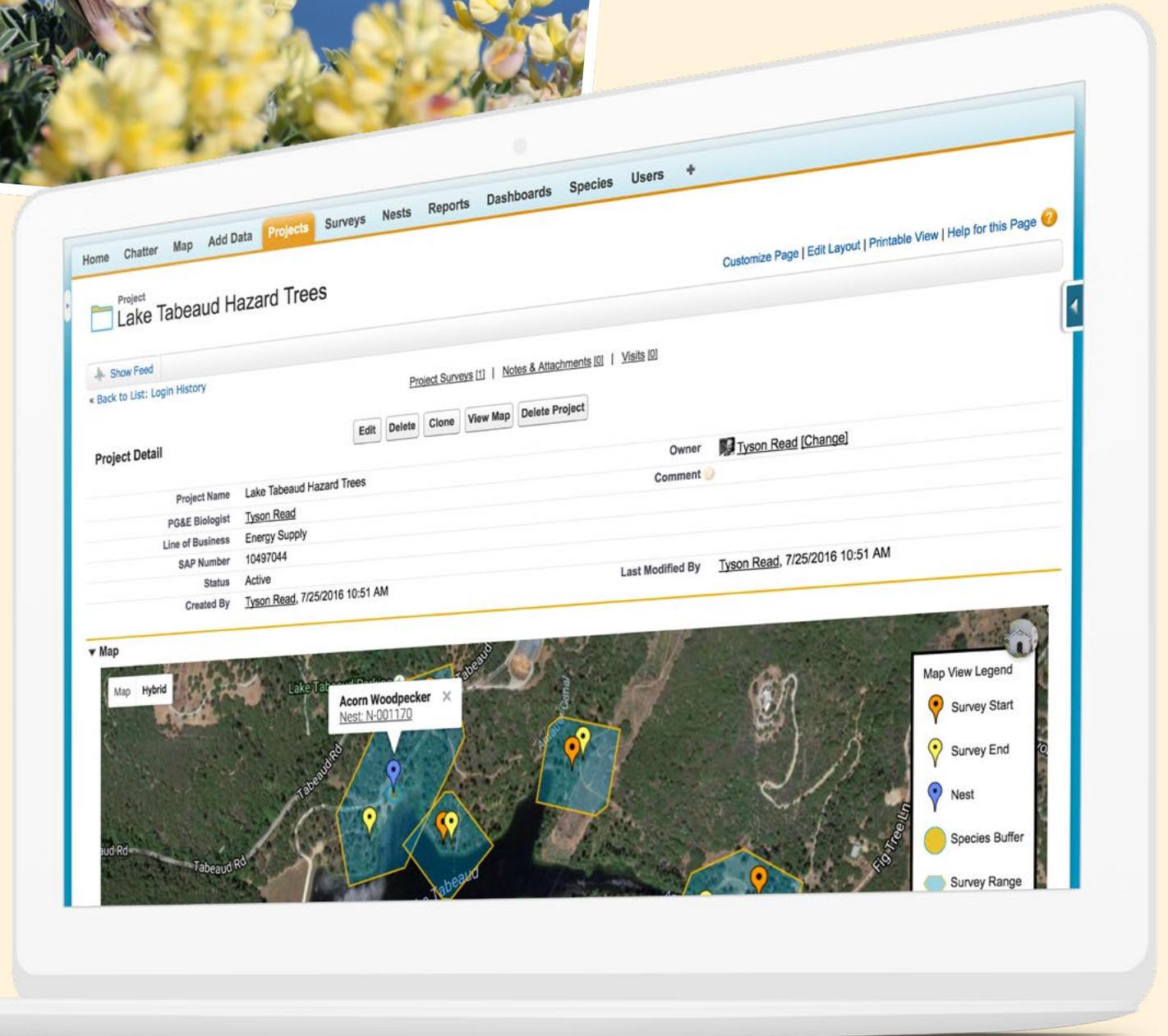


reptiles, amphibians, and plants. We are really interested in integrating this data into our other systems and building customer-facing portals for our community stakeholders and our internal business partners. EarlyBird is just part of what PG&E is doing to build a better California.”

The Salesforce Platform was selected for the project, Read said, because “we were really impressed with Salesforce’s developer toolkit and saw a lot of potential.” On top of Salesforce’s existing features, EarlyBird also needed to have extensive mapping and offline capabilities, because biologists often collect data in places with no connectivity. “The Salesforce1 Mobile App and our native EarlyBird apps,” he said, “gave us all the options we need.”

2 developers
built the app

6 months
development time



Life Is On



FOUNDED 1836 | SIZE 160,000 employees | LOCATION Rueil-Malmaison, France | WEBSITE schneider-electric.com

Innovation at every level for a new world of energy

In this age of instant connectivity, it's surprising that more than 2 billion people around the world still lack electricity or reliable sources of energy. Schneider Electric, the global expert in energy management and automation, believes that access to energy is a basic human right and that today's approach to energy management is unsustainable.

Schneider Electric has made bringing energy to everyone on the planet a core part of its mission. The company makes access to energy safe, reliable, efficient, connected, and sustainable. By redefining power and automation – and by innovating at every level – Schneider Electric invents connected technologies that ensure Life Is On everywhere, for everyone, at every moment.

Schneider Electric power distribution products and energy management components are installed in 40%–60% of buildings around the world, prompting one company executive to call it “the world's biggest invisible brand.” Still, to power its trailblazing mission and achieve its ambitious goals, Schneider Electric must continue to make energy ever more efficient and sustainable.

That's why Schneider Electric relies on Salesforce as a partner across its business. In fact, using the Salesforce Platform, the IT team at Schneider Electric is able to unite employees and partners in hundreds of countries with applications that transform how they conduct their business and share data across various departments.



“Before Salesforce, we had maybe a hundred different systems with little silos of customer data. Now, it's one transversal customer platform.”

– **Hervé Coureil**, CIO





THE BUSINESS CHALLENGE

Rapid growth puts pressure on IT to catch up

For nearly two decades, Schneider Electric has grown rapidly, largely through acquisitions, which posed several new challenges for the CIO and IT team. First, they needed to integrate the disparate systems of the newly acquired companies – an ongoing challenge. Any new solutions would also need to connect an increasingly mobile workforce – currently over 120,000 connected employees around the world – so that any employee could access these systems through a mobile device.

So the company launched a global initiative to streamline and align front-office business processes and create a global network of excellence to better serve customers and boost cross-selling. To make the initiative work, Schneider Electric needed to unite the company on a single agile platform that could be deployed quickly to tens of thousands of employees.



THE SOLUTION

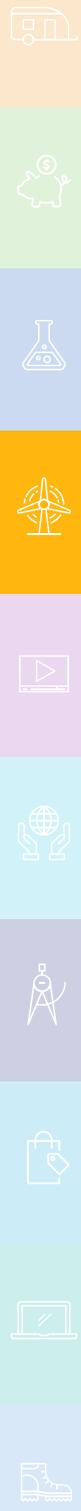
One platform to connect employees, customers, and suppliers around the world

Like with so many companies, Schneider Electric's long history with Salesforce began when the company needed a customer relationship management (CRM) solution. In 2010, as part of the "One Schneider" strategy, the company launched an initiative to replace multiple vendors with a single solution shared by all employees. Initially, the goal was to give its global sales teams a 360-degree view of its customers and help teams collaborate across disciplines and geography. But the advantages unique to Salesforce – a secure, trusted platform for all the customer data and a growing array of tools to leverage that data – made a compelling business case for consolidating on Salesforce.

A prior CRM solution had suffered from low adoption rates, but in less than two years, 30,000 Schneider Electric employees in 70 countries embraced Sales Cloud to drive sales and service performance worldwide. Over time, the company has added Service Cloud, Community Cloud, Salesforce Platform, and more than 30 apps from the Salesforce ecosystem through AppExchange – and now has a total of more than 43,000 Salesforce users around the world.

That means today, Salesforce's highly scalable, cloud-based model is the customer platform that helps the company's sales teams learn more with every interaction – and that delivers the efficiency they need.

 "Salesforce has completely transformed the way we manage our customer base," said Chris Leong, CMO. "We now have one version of the truth to rally the company behind."



Salesforce has become the foundation within the company for customer-centric employee collaboration – enabling an increased focus on solutions, as well as connected products. That approach – solution selling, which accounted for only 10% of revenues as recently as 2009 – now accounts for more than 40% of the company’s revenue. Customer satisfaction has also improved dramatically.

By strictly adhering to two of its core principles – creating a unique account for each customer and logging every customer interaction – the company built a repository of 3 million customer records and 10 million interactions. The Schneider Electric team plans to develop apps to mine the repository, which “totally changes the paradigm of collaboration,” said Leong.

And now Schneider Electric is harnessing a new power source to drive business with Salesforce: data. For example, when a building averages 82% energy inefficiency, there is a lot of room for improvement – and leveraging data is the best way to find incremental efficiencies.

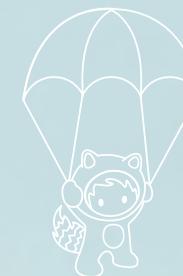
“Our value proposition is around efficiency, how to make a process or building more efficient – and you can’t do that without harnessing data, leveraging analytics, and turning it into information and predictive intelligence,” said Hervé Coureil, CIO.

“We wanted to move away from a very process-centric, one-size-fits-all view of the world to a user-centric process,” he said. These users – whether employees, partners, or customers – are key to the new way of doing things for the company. “Schneider is a customer-first company. We start our executive committee meeting by reviewing customer satisfaction and customer loyalty. So it’s customers at the heart of everything we do,” said Coureil.

Salesforce helps Schneider Electric become more predictive with each customer. By combining all the customer data with product information, the company is gleaning insights that will unleash new products and services.

“As CIOs, we can make a huge difference when we help our companies really connect the dots, connect data silos, connect process silos,” said Coureil.

Next on Coureil’s agenda is tapping the power of the internet of things (IoT), connecting Schneider Electric’s millions of devices distributed worldwide. “IoT is not really something new, because we’ve been connecting products on the factory floor and the production line for quite a while. What’s taken IoT to the next level is the cloud because of the number of connected products and the scale you can reach,” said Coureil. “And then it’s the level of analytics, AI, and predictive algorithms you can put on top of the data.”



Spotlight

Challenge



App Spotlight

App Name

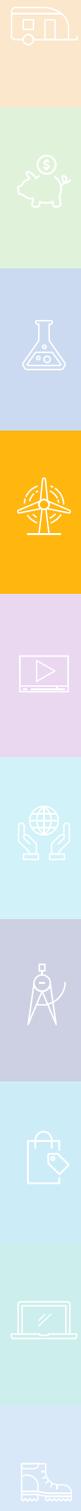
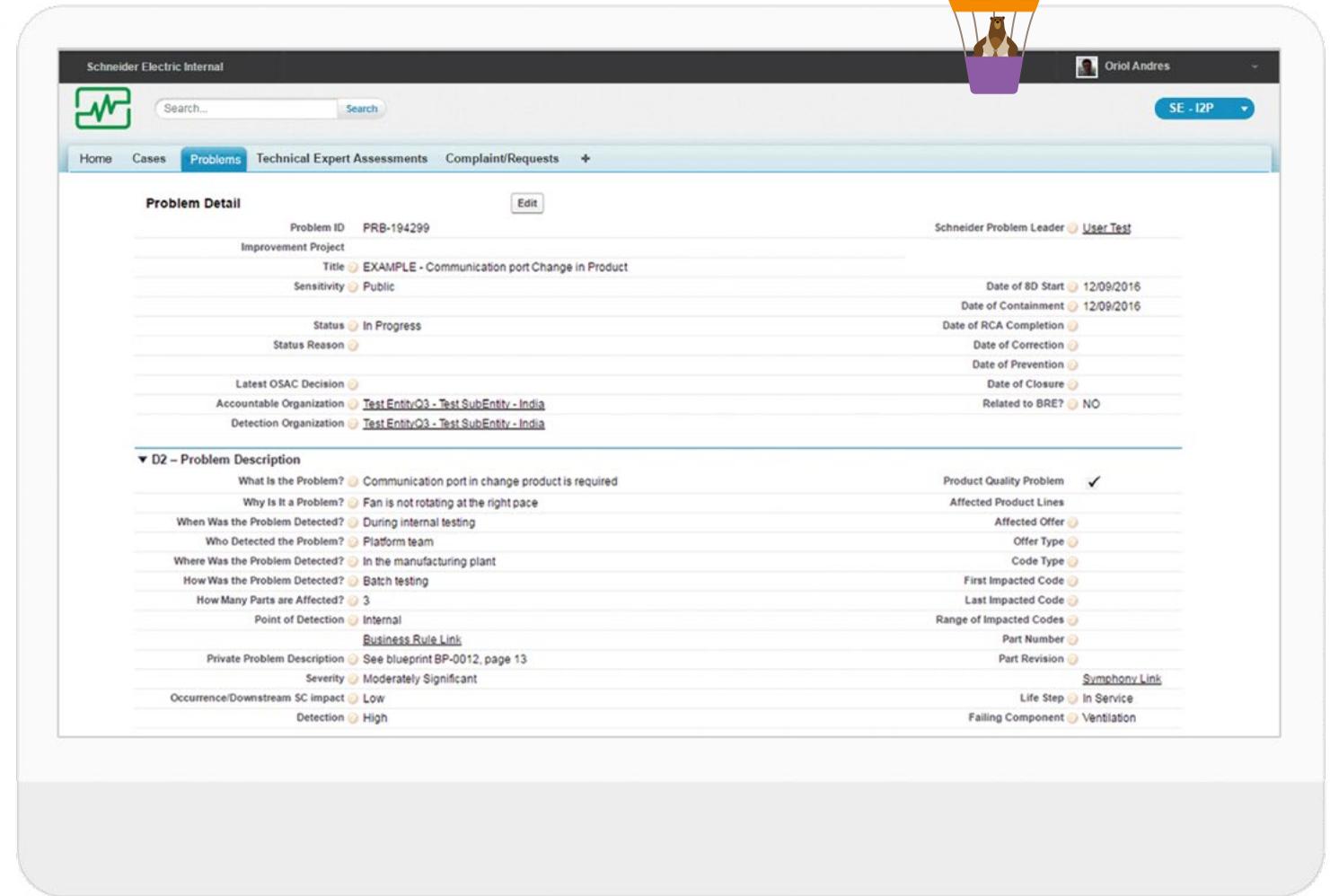
I2P

What is it?

I2P stands for Issue to Prevention, an app for product problem resolution that deploys common tools and practices across the entire company, replacing legacy tools like GRAP, Planet QI & PSA, and Critical Issues.

What does it do?

It provides real-time product feedback to departments across the company – from QA to R&D – to quickly resolve issues, detect recurrences, and collaborate on prevention.





Q&A with Hervé Coureil

CIO at Schneider Electric

After a career in finance, Hervé Coureil became Schneider Electric's CIO in 2008. We sat down with him recently to talk about how Schneider Electric is blazing new trails with its global business.

Q: *What do you see as the biggest transformation in IT today?*

A: I truly believe that one of the big transformations in IT is the move from process-first to user-first. And the user can be your customer, your partner, or your employee. It's really about standing back and saying, "Okay. The process can be in the background. It should be invisible. What matters is the experience of your customer, the experience of your partner, the experience of your employee."

Q: *What role does the CIO play in this transformation?*

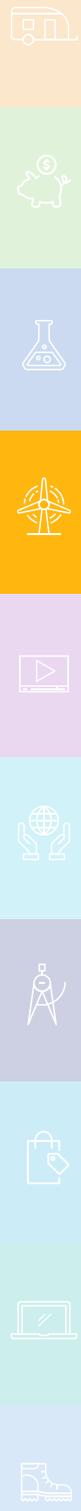
A: The key is that we want to empower our employees. For instance, we help them run their business from their mobile device – to share content, to work on deals – wherever they are. I really think that's one of the key purposes of the CIO. How am I empowering developers? How am I empowering our businesses to become more digital? How am I empowering our partners, our customers, and each and every employee? That's a great goal. And you mobilize all your technology – all your IT team – around that goal.

Q: *What do you see coming next?*

A: I think that artificial intelligence is going to be the next big thing. But like IoT, it's also how you connect it to your enterprise processes. Because artificial intelligence in a vacuum is not going to get you very far. What's really super interesting is taking cloud, mobile, big data, analytics, and artificial intelligence, and combining and integrating them with your back-end processes and systems. I think that the convergence of massive increase in computing power and massive scale of data – and the fact that today, more people and products are connected than ever before – is huge.

Q: *How is Salesforce helping you be more predictive with each customer?*

A: With Salesforce, we can leverage this unique customer platform to connect, when relevant, information generated by our connected products with customer or service data. The power of IoT working with the platform will unleash terrific things for our customers.



How trailblazers are catering to the new media mogul: the customer

Media is still huge – it's the screen that got small. When content made the leap from the TV to the laptop to the smartphone, it was all part of a revolution that put the consumer firmly in charge. In the Age of the Customer, consumers control what they watch, when they watch it, and how – and trailblazing media companies deliver on-demand shows, online streaming, and binge-worthy full-season releases.

Trailblazers in this new frontier offer content curated for and tailored to individual consumers, and then invite them into a shared experience through social media. As you'll see in these stories, with apps built on Salesforce, media companies have been able to increase their e-commerce opportunities and create cloud-based communities, seamless customer experiences, and personalized content for their customers. Which means the show, indeed, will go on.





FOUNDED 1888 | SIZE 2,200+ employees | LOCATION London, England | WEBSITE ft.com

Financial Times revolutionizes the business of business journalism.

These days, even solid brands with a loyal customer base aren't immune to the forces of technological disruption, and the venerable *Financial Times* is no different. As reading habits changed and the internet decimated newspaper revenue streams, the *Financial Times* made the pioneering decision to reinvent its business, transforming a single media property into a multitude of digital editions.

Although the print newspaper still graces the doorsteps of global leaders each morning, it's the digital edition and a growing roster of specialized subscription content that is driving growth at the company. And the company's digital transformation is accelerating, thanks to dozens of apps built on the Salesforce Platform for everything from purchasing to a new version of the Financial Times website, built on Heroku from Salesforce.



“All our ft.com customers, whether they are users or subscribers, are inside Salesforce, and we service them from a single place.”

– David Edge, Software Development Manager





THE BUSINESS CHALLENGE

How to monetize content in an era of free.

The challenge facing traditional media for decades has been how to offset the rapid decline in advertising revenues as circulation erodes. Some media companies, like *The Wall Street Journal*, have tried charging a subscription to access all content, but this approach has been met with mixed success. The *Financial Times* built a paywall and kept growing its digital presence, but it was struggling with finding a unified approach to customer engagement.

Without a detailed portrait of its 2.1 million global readership, how could the company begin to tailor all of its content to individual segments? And so an intensive research effort was launched, including creating personas and analyzing the behavior of both subscribers and users.

The more the company's leaders learned about their customers, the more they knew they needed to redesign the business around a single customer engagement model that could both deliver a unified brand across all channels and deliver specialized content to the right customers, at the right time, on the device of their choosing.



“We didn’t know who our customers were, and the essence of our digital strategy was to find out. That was vital to our survival,”
said Caspar de Bono, Managing Director for B2B.



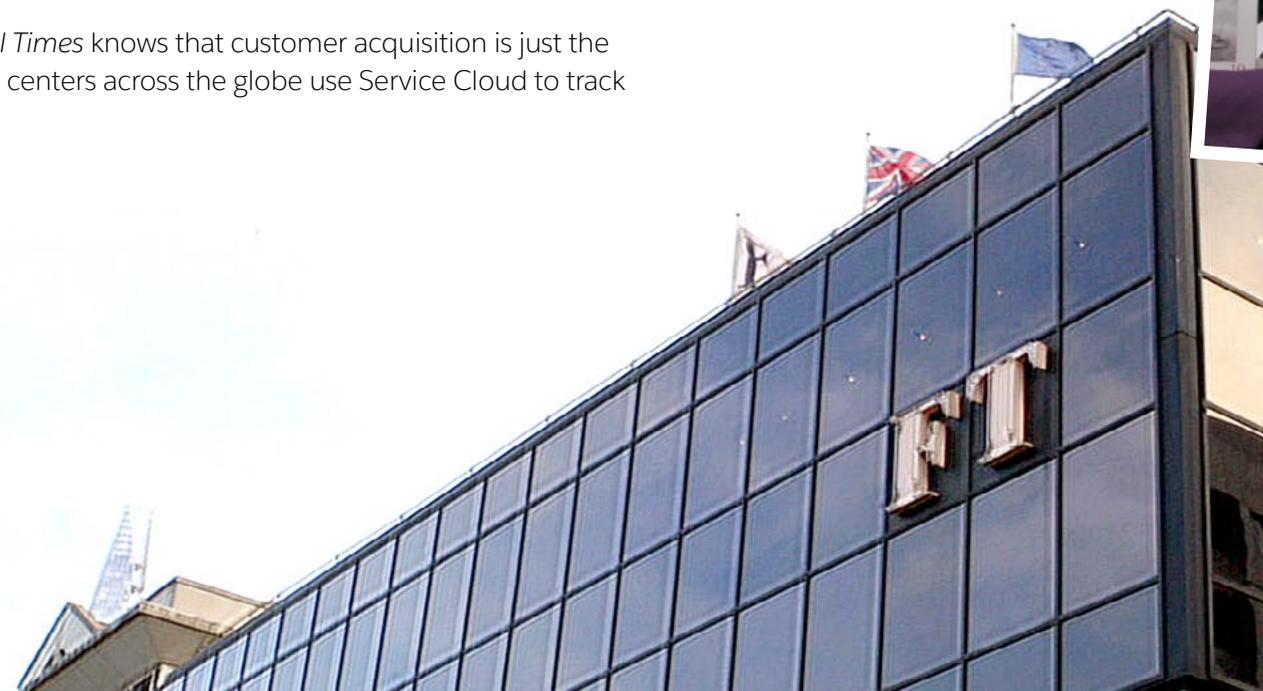
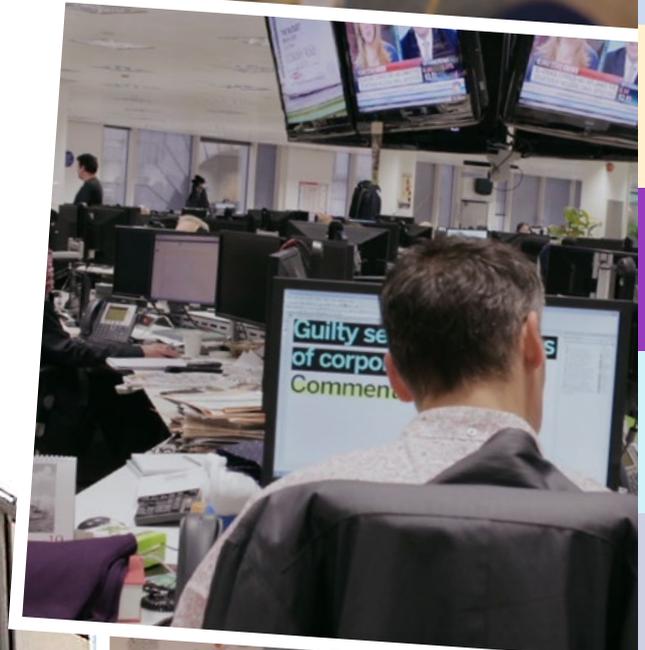
THE SOLUTION

Delivering highly specialized content tailored to the needs of the customer.

With the Salesforce Platform, the IT team is revolutionizing its customer engagement model. Heroku provides a highly scalable consumer application platform, helping the team reinvent and revolutionize the content and the manner in which that content is delivered to customers around the world. From social sharing to social content gifting, *Financial Times* product managers now have the ability to transform the presentation layer with the evolution of the digital.

Many of the organization's employees were already using Salesforce, including the ad sales teams, journalists, and back-office personnel. With a single view of customer information, teams across the company were better able to attract and retain advertisers and subscribers with their contact information and activities tracked in Sales Cloud. The company also uses Sales Cloud to manage subscriber data, and is moving its billing system – for both businesses and consumers – into Salesforce for complete and detailed views.

As a subscription business, the *Financial Times* knows that customer acquisition is just the beginning. More than 100 agents in call centers across the globe use Service Cloud to track issues and resolve them quickly.



THE APPS

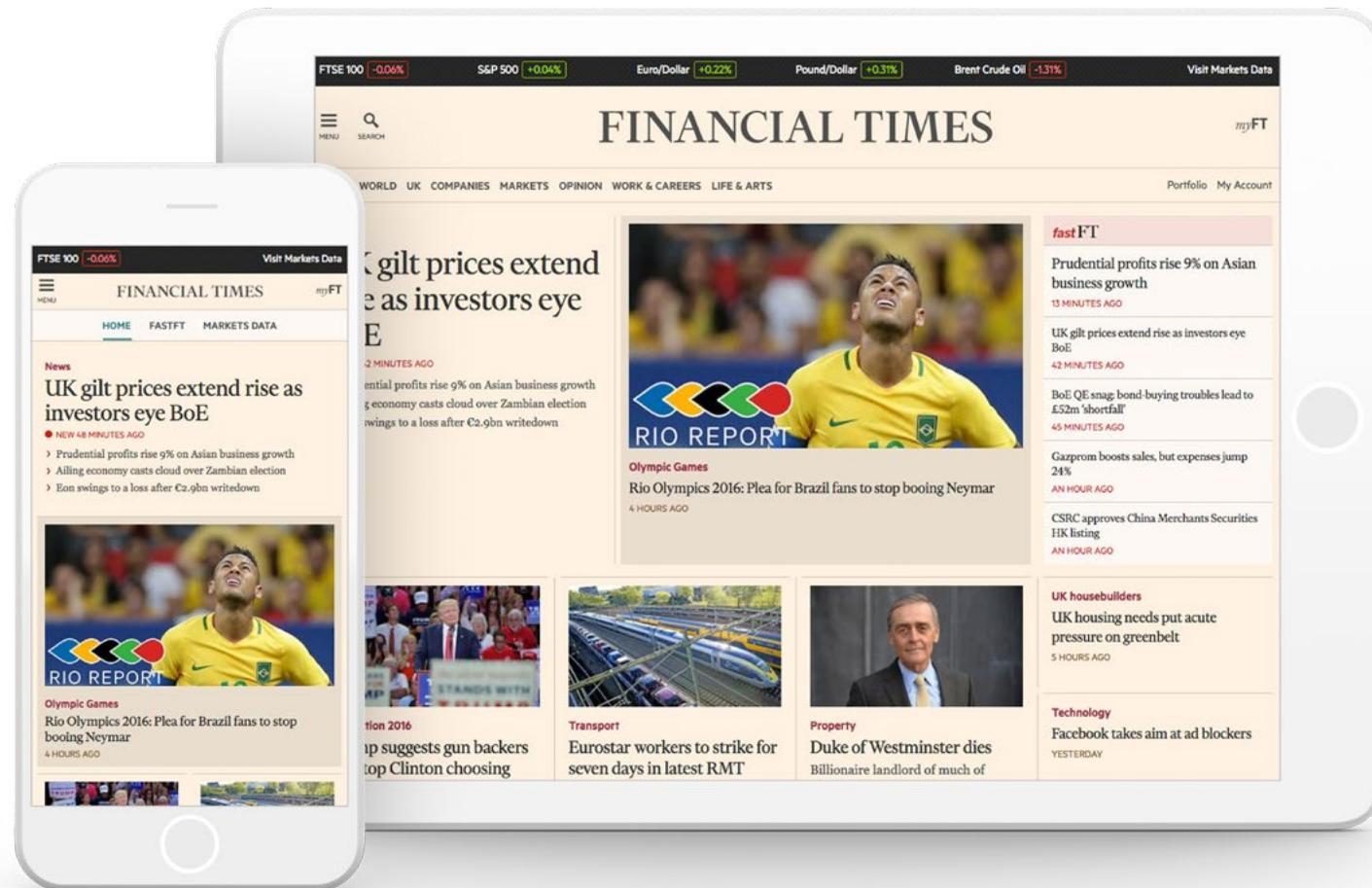
From digital magazines to HR apps, the entire business runs on one platform.



The Salesforce platform has given employees across the organization the capability to build the apps they need, fast, without the need for additional IT resources. The *Financial Times* has built 30 to 40 apps with the Salesforce Platform, including apps for purchasing, contributor management, HR authorizations, book inventory, holiday booking system, training requests, visitor logging, and more.

Using Heroku, the *Financial Times* was able to build a next-generation version of its flagship website. The new ft.com is faster, more personalized, and provides readers with a consistent experience across all devices.

The Salesforce Platform even powers the website of the company's popular luxury lifestyle magazine, *How to Spend It*, which won "Innovation of the Year" at the 2015 British Society of Magazine Editors.





How trailblazers found a whole new way to connect donors to the cause



Despite the name, nonprofits are under the same pressures as companies in the private sector to streamline operations, automate processes, and find efficiencies that contribute to the bottom line. More and more, apps are where members, donors, and prospects engage with their causes, and the trailblazers in the nonprofit sector are delivering always-on responsiveness and rich, engaging experiences.

As the stories on the following pages illustrate, the most innovative nonprofits are using apps to connect their members to their causes in new ways – triggering actions, delivering timely information on pressing issues, and increasing the philanthropic contribution of members – without increasing their fundraising costs.



charity: water

FOUNDED 2006 | SIZE 71 Employees | LOCATION New York, NY | WEBSITE charitywater.org

How an innovative charity streamlines the donation process to **bring clean water to more people worldwide.**

Imagine being thirsty, really thirsty. Imagine your closest source of drinking water being either several miles away or a polluted river or swamp. This is a daily reality for nearly 663 million people in the world – that’s one in 10 people on the planet. Water is a fundamental human necessity. Lack of safe water and basic sanitation causes 80% of diseases and more deaths every year than any form of violence, including war. Yet there are simple solutions that can save millions of lives.

charity: water was founded in 2006 to help solve the global water crisis. The organization works to fund clean water projects, like hand dug and drilled wells with water filtration and sanitation systems. Not only is charity: water on a mission to bring clean water to every person on the planet, but the organization is also dedicated to reinventing charity for a new generation of donors and fundraisers.

 “Our experience with Heroku has been so seamless – it not only saves us time, but saves on opportunity cost. We don’t have to hire a DevOps role, which means operational budget can be directed to fundraising activities.”

– **Matthew Eckstein**, CTO





THE BUSINESS CHALLENGE

An outdated **fundraising platform** was slowing the flow of donations

Many people are reluctant to give to nonprofits because they don't know where their money goes or how it is used. In an effort to reestablish faith in nonprofits, charity: water makes sure that 100% of public donations fund clean water projects. The organization depends on private donors, foundations, and sponsors to cover everything from staff salaries and basic office systems to office rent and supplies. Donors are some of the group's most dedicated: their investment fuels the organization's long-term mission, its ability to scale, and its mission to continue using 100% of public donations for water projects.

The nonprofit also operates a fundraising platform and invites anyone to start his or her own campaign to raise money for clean water projects. One of the most popular themes is birthdays – many of the nonprofit's individual fundraisers will run a campaign for friends to donate in lieu of traditional presents.

The organization's team of nine engineers built and now maintain a range of apps beyond their main website. There's the peer-to-peer fundraising platform and internal app that helps the organization make fundraising decisions. There's also a dispatch monitor app that measures and analyzes water flow data from a sensor installed on the wells, with a component for field staff to manually record maintenance or observation data.

The challenge for charity: water was a set of back-end systems originally built on PHP and Java. The systems had become outdated and no longer ideal for supporting product evolution. The team decided to rebuild charity: water's entire fundraising system from scratch. But the organization needed a solution that was flexible enough to support a more agile process, could increase the pace of development, save costs, and easily integrate third-party services, such as its payment processors and general ledger system.



THE SOLUTION

Building on Heroku opens the floodgates to innovation

The engineering team was already familiar with Heroku from Salesforce and confident about moving its systems over to the platform. Team members knew that the platform-as-a-service (PaaS) model fit their needs, and many consulting partners they had worked with recommended Heroku as their go-to PaaS solution.

The fact that James Lindenbaum, a Heroku founder, was a big supporter of charity: water just added extra incentive.

The team has been migrating parts of its system to Heroku using Ruby on Rails connected to a Heroku Postgres database. The team's marketing site is currently in PHP running on a traditional hosting solution, and this year they plan to rebuild it on Heroku. Most recently, a system that collects water flow data from sensors installed on wells was built on Heroku. Going forward, anything new will be built on Heroku.

The developers love the wide range of Heroku add-ons and they've integrated many of them, including Heroku Postgres, Heroku Redis, Codeship, Fastly, Cloudinary, Rollbar, Sentry, SendGrid, Papertrail, SSL, Adept Scale, MemCachier, Redis To Go, Heroku Scheduler, and Deploy.

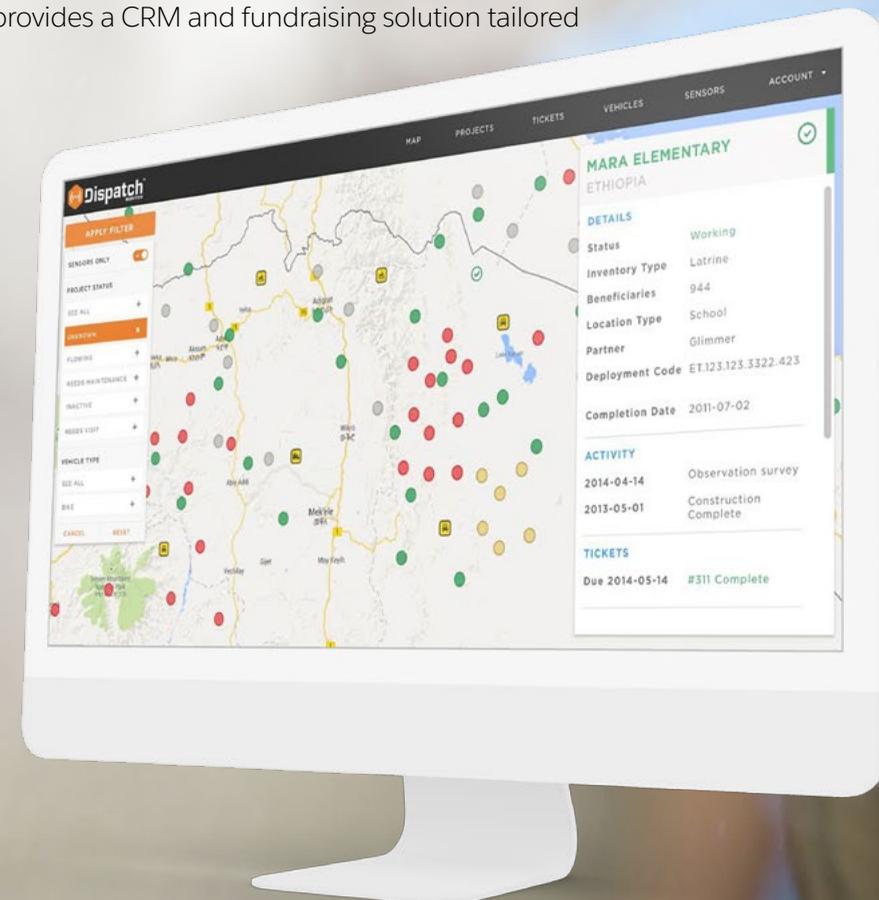


“Heroku add-ons have saved our team a lot of time and effort. They are really easy to use and easy to integrate.” said Matthew Eckstein, CTO

The engineers at charity: water take a test-driven development approach, using Heroku's Review Apps feature for quality control before merging their new code to the master and deploying it to a Heroku pipeline. Each

developer is responsible for the end-to-end delivery of the feature he or she is working on. The team takes full advantage of Heroku's Git integration and runs continuous integration and continuous delivery processes.

The charity: water development team has recently started the first phase of an organization-wide CRM project. The team is currently getting set up with Salesforce and an app from Salesforce AppExchange called roundCause, which provides a CRM and fundraising solution tailored to nonprofits.





Q&A with Matthew Eckstein, CTO at charity: water

Q: *Tell us a bit about charity: water.*

A: charity: water is a nonprofit organization that brings clean and safe drinking water to people in developing nations all around the world.

We rebuilt our online fundraising and donation platform on Heroku. When we first moved to Heroku, we decided to rebuild our system from the ground up. The engineering team was already familiar with Heroku, which made it an easy choice.

Q: *Tell us about your stack.*

A: Our new stack is built using Ruby on Rails connected to a Heroku Postgres database. We do a lot of asynchronous processing using Sidekiq and Heroku Redis.

We recently started adding isomorphic React components using both the Ruby and Node.js Heroku Buildpacks because we were building some complex JavaScript behaviors. It seems to be going well so far.

When we think about our new stack at charity: water, Heroku is at the core of it. Any system that we build or rebuild gets put on Heroku. Also, continuous integration is woven into Heroku, which is perfect for us.

Q: *What about your application architecture? Is your API separate from your front-end client?*

A: Our fundraising platform is one app. We don't have a separate front-end client that uses an API. We do have other apps with specific

functions that are also hosted on Heroku. One such app is a Sinatra app that takes callbacks from our payment providers and syncs the data to our fundraising platform and our general ledger.

Q: *What is your deployment process?*

A: We use Heroku's Git integration for source control and deployment, along with GitHub, pull requests, and a continuous integration process using Codeship as a Heroku add-on. For the fundraising app, we use a continuous delivery process.

We do test-driven development with test coverage close to 100%. So when we make a pull request, we use Heroku's Review Apps for testing and merge to master. It runs CI again and deploys through Heroku Pipeline.

Q: *How do you conduct internal reviews?*

A: We have three checkpoints before deployment. At least one engineer will review every pull request. The first thing the reviewing engineer looks for is that the solution is simple and directly addresses the problem we are trying to solve. We would rather write clear, simple code and refactor later than risk over-engineering and create unneeded complexity. We also look to make sure it is obvious what the code does and what the effect of a change would be. One ideal we strive for is that all code pushed to production should be exemplary. Our code should have the ability to be used as an example of how to write new code. There shouldn't be anything on our site that we wouldn't want to replicate.





There are always comments in our PRs. Every once in a while we will see one with many comments. It's a good sign when that happens because it means our engineers are very actively reviewing the code. I'd rather see a clash of strong opinions than a very passive process where people are just looking for obvious mistakes.

If the Priority Review addresses a user-facing feature, our product team and/or creative team will use Heroku's Review Apps to test it from a user's point of view as well. It's great how seamless the review app integrates into our workflow.

Finally, we have all of our automated testing. If it can be automated, we prefer to automate it.

Q: *What has been the greatest benefit to using Heroku?*

A: charity: water has always been at the leading edge of using technology to drive our work. We raise a tremendous percentage of our funds online, and we also use technology heavily in our operations and to monitor our projects in the field.

Our 100% model means that we fundraise separately for operations and water projects. When we can save money on ops, we're also saving on opportunity cost. Our fundraisers can now focus more of their time on raising money for water. Heroku's services are so seamless and easy to use – the add-on services, the deploy process with Git integration, and Review Apps – it allows our engineers to focus on work that raises money and makes our operation more efficient. Heroku's services eliminate the need for a dedicated DevOps role at charity: water, which saves operational budget that can be applied elsewhere in the organization.





ILLUMINATE

FOUNDED 2012 | SIZE 4 Employees | LOCATION San Francisco, CA | WEBSITE sif.illuminate.org

A donor app **raises funds** for a one-of-a-kind public artwork.

Every night, from dusk until dawn, the San Francisco Bay Bridge shimmers with the beauty of 25,000 flickering white lights that make up The Bay Lights, by acclaimed light artist Leo Villareal. Illuminating the bridge's suspender cables in mesmerizing patterns influenced by wind, waves, and traffic, The Bay Lights premiered in 2013 as a temporary two-year project, but quickly became an iconic fixture in Bay Area life. As Illuminate, the nonprofit arts organization, worked to make the artwork a permanent feature of the nighttime skyline, Salesforce.org pitched in with the Shine It Forward fundraising app, built on Heroku for Salesforce.

The team at Illuminate had led the initiative for the original Bay Lights project and wanted a donor app to inspire people to fund similar large-scale artworks in the region. With support from Salesforce.org, Illuminate was able to establish a donor system on Heroku and then launch Shine It Forward, a mobile-first app that performs seamlessly across mobile, tablet, and desktop browsers. "Building our app on Heroku has helped us better engage donors by giving them an elegant, sophisticated user experience on any device," said Ben Davis, Founder and Chief Visionary Officer.

Using Shine It Forward, a donor can dedicate one of the 25,000 LED lights in the bridge display to a loved one and then memorialize the dedication by uploading a photo and text to the app. The system randomly assigns one light from an available pool of lights, and app users can navigate to the light detail page and zoom in on the specific light assigned for each donor. The app provides a downloadable "certificate of authenticity" – a beautifully rendered photo of The Bay Lights overlaid with personalized text. Donors can generate permalinks to share their dedication on Facebook, Twitter, and other social media sites.

Thanks largely to Heroku add-ons, the Shine It Forward developer team was able deliver the app within a six-week timeframe.

 **"Heroku add-ons were a huge boon to our project timeline. What might've taken weeks, instead was accomplished exquisitely within a matter of hours."**

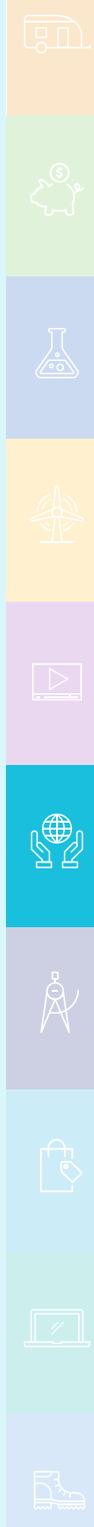
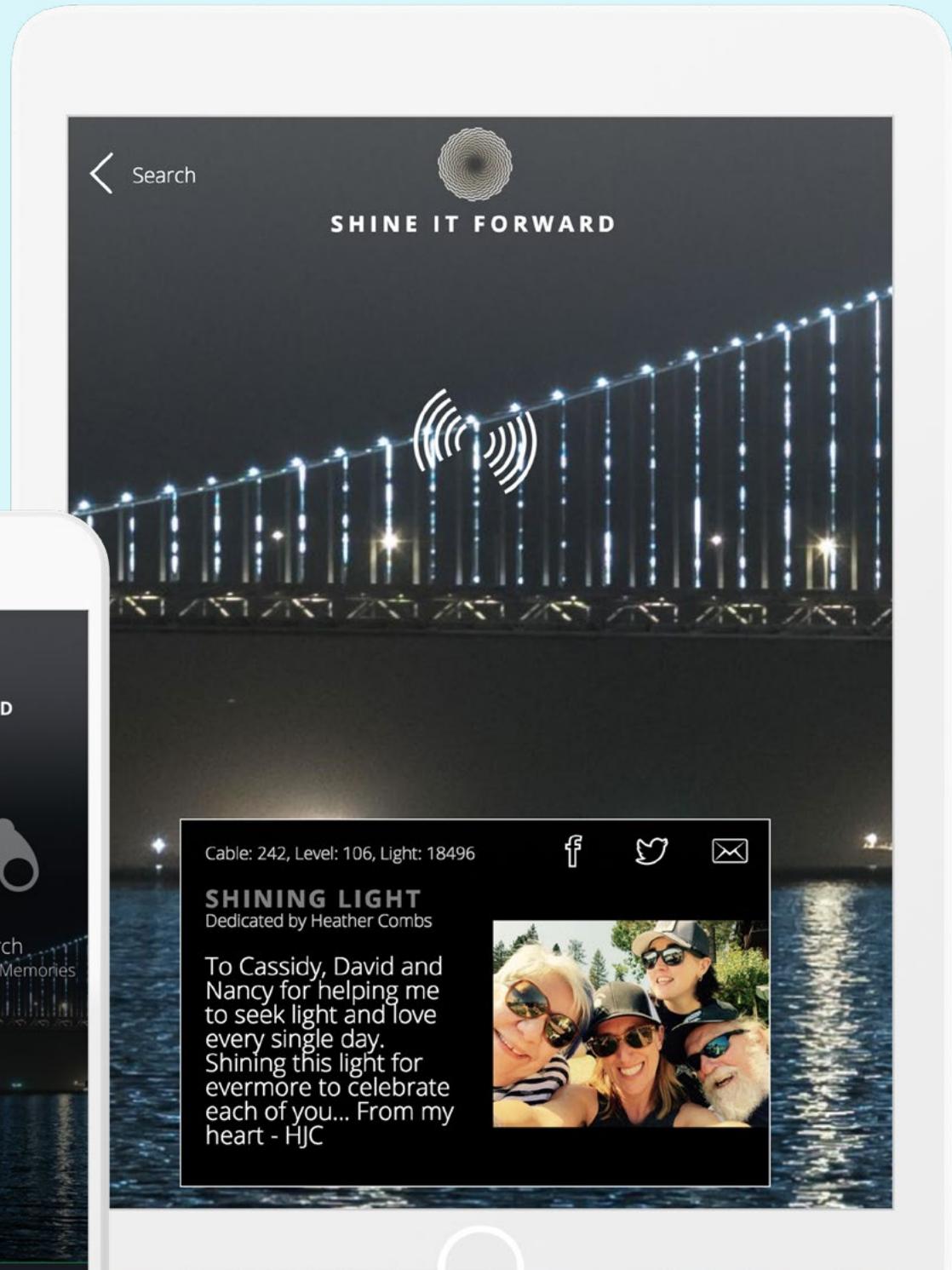
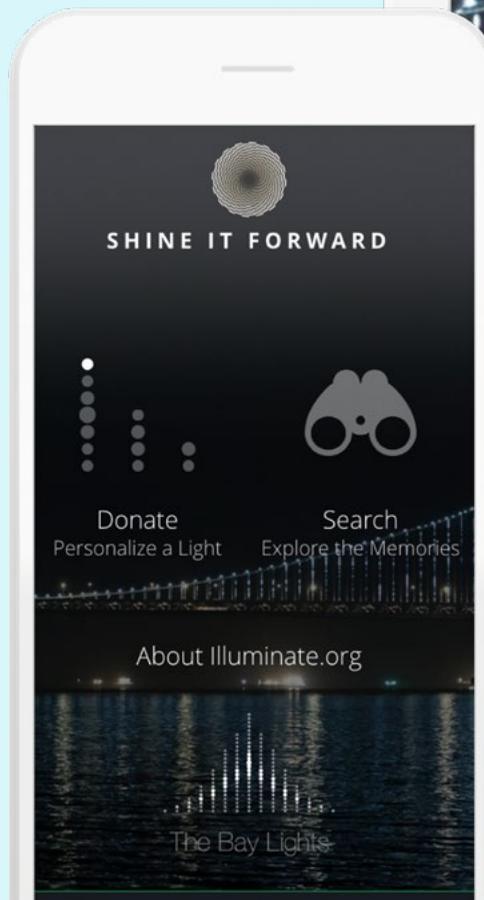
– **Ben Davis**, *Founder and Chief Visionary Officer*



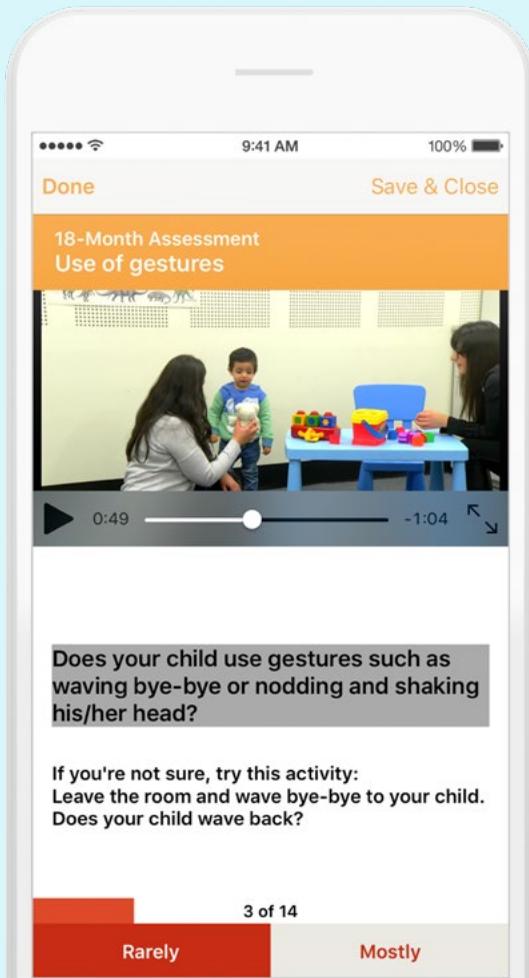
Add-ons included a Heroku Postgres database, Mailgun for email automation of personalized thank-you emails, Papertrail for log management, and Zerigo DNS for DNS management.

“Salesforce and Heroku have enabled us to build a robust donor engagement system that we can use to create ongoing relationships,” said Davis. “That’s an extremely valuable asset for an arts organization.”

6 weeks
from idea to app



OTARC eases parents' concerns with an app for autism detection.



An early diagnosis of Autism Spectrum Disorder (ASD) is critical because the earlier the diagnosis, the greater the chance of a successful intervention. An autism-detection mobile app, developed by Australia's Olga Tennison Autism Research Centre (OTARC) at La Trobe University, and built on Heroku from Salesforce, makes it especially easy for parents to recognize if their very young children may be developing autism.

The ASDetect app asks parents a series of questions and shows videos demonstrating the "key" behaviors that may signify ASD in babies as young as 12 months. Inconsistent eye contact, not responding when one's name is called, and not pointing to indicate interest in objects are some indicators a child may not be developing as expected. A team of Salesforce engineers,

designers, and developers volunteered their time to build the app as part of the company's integrated philanthropy model. "The new ASDetect app is an ideal way to share evidence-based techniques with thousands of parents," said Dr. Josephine Barbaro, an autism researcher at La Trobe University in Melbourne.

 "ASDetect is an empowering tool for parents who may feel their children are developing differently than expected and are looking for answers."

– Dr. Josephine Barbaro, *La Trobe University*

The app's questions were modeled on some of Dr. Barbaro's breakthrough research.

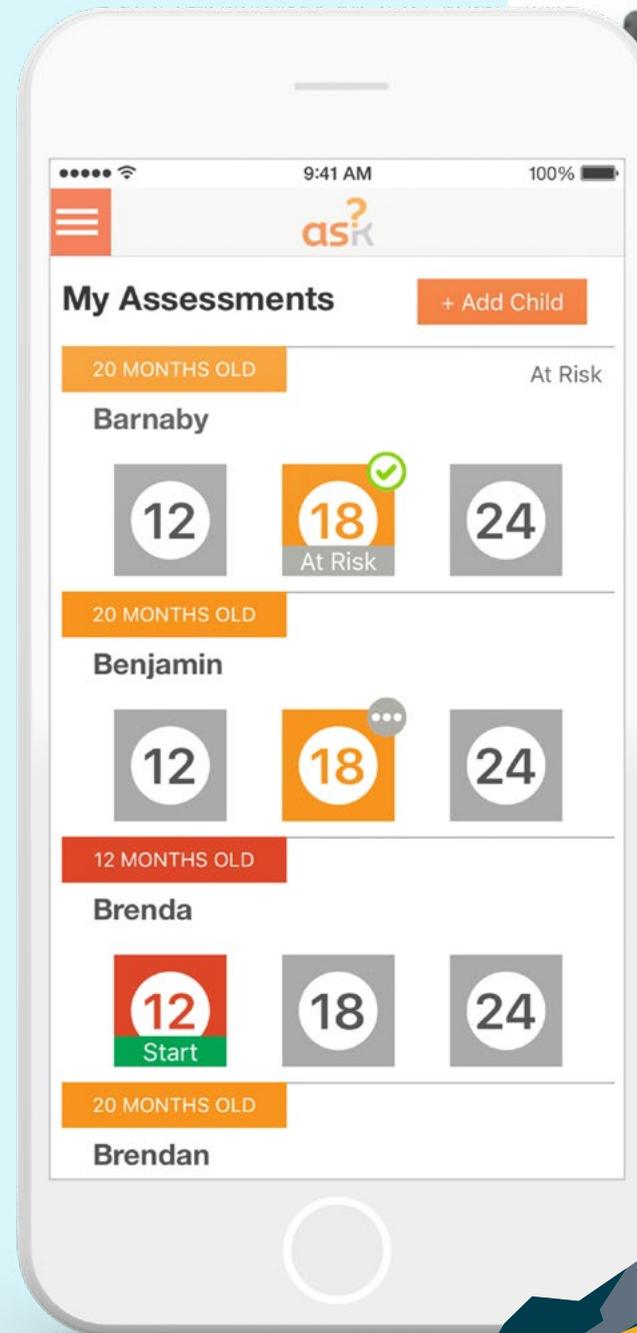


Information entered in the app is integrated with Sales Cloud and Marketing Cloud, streamlining access to the database at OTARC, where analysis of individual results is completed. Parents then receive advice through the app as to whether they should seek professional help. Within six months of launch, there have been almost 10,000 installs and over 4,000 assessments completed.

“This is not a replacement for professional assessment,” Dr. Barbaro noted. “However, ASDetect will provide parents with an indication as to whether they should seek a professional opinion from a doctor at a time when intervention will have the biggest impact.”

10,000
app installs

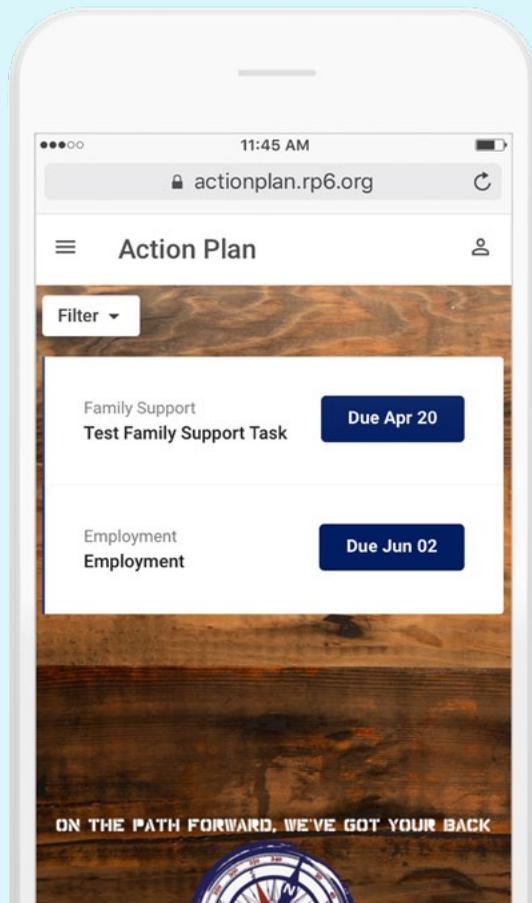
4,000+
ASD assessments completed





FOUNDED 2011 | SIZE 23 Employees and 67 Volunteers | LOCATION Lakewood, WA | WEBSITE rp6.org

The RP/6 Action Plan app **supports the return to civilian life** for military service members.



“On the path forward, we’ve got your back.” That’s the promise nonprofit organization RP/6 (RallyPoint/6) makes to service members leaving the military as they reintegrate into communities in Washington state and across the country. RP/6 has been able to fulfill that promise to service members and their families faster and more efficiently than ever before.

The RP/6 leadership team developed an innovative Salesforce mobile app that ensures every step of a service member’s transition is supported by their own personal action plan they can access from anywhere, anytime on their RP/6 mobile app.

Founded by two former soldiers, the “RallyPoint” was created to connect the best of the private sector with the best of those who have served in

the military. RP/6 focuses on building long-lasting collaborative relationships with public and private resources that support transition to civilian life by connecting service members with opportunities—including employment, education, veterans’ benefits, and other resources. RP/6 Scouts (case managers) work with each individual to develop personalized action plans that guide each member toward achieving his or her professional and personal goals. “The key to success is personal relationships with those we serve and those we serve with. With the technology of Salesforce, the follow-up and follow-through is seamless,” said Kylee Durant, Active Duty Army Spouse, Chief Operating Officer, and Salesforce MVP.

Service members can then access their action plans through a fully responsive mobile app, built on Heroku from Salesforce. Linked to each Salesforce case record, the Action Plan app automates workflows so efficiently that new clients can review their plans, update the plan, and provide feedback on their experience in real time, including the option of chatting with their Scout. Since customizing the Salesforce platform to support the RP/6 mission and launching the Action Plan app, RP/6 has also been able to serve 50%



more service members than it had in the past, which has helped inspire the organization's leaders to think big.

"RP/6 formed a strategic partnership with the USO in 2015. The innovativeness of our Salesforce platform and mobile app will soon be supporting service and family members globally," said Anne Sprute, Founder, CEO, and U.S. Army Veteran.



"Salesforce has taken our ideas and made them into a reality, allowing us to make a real impact in the military and veteran community."

– **R.J. Naugle**, *Co-Founder and U.S. Army Veteran*

50%

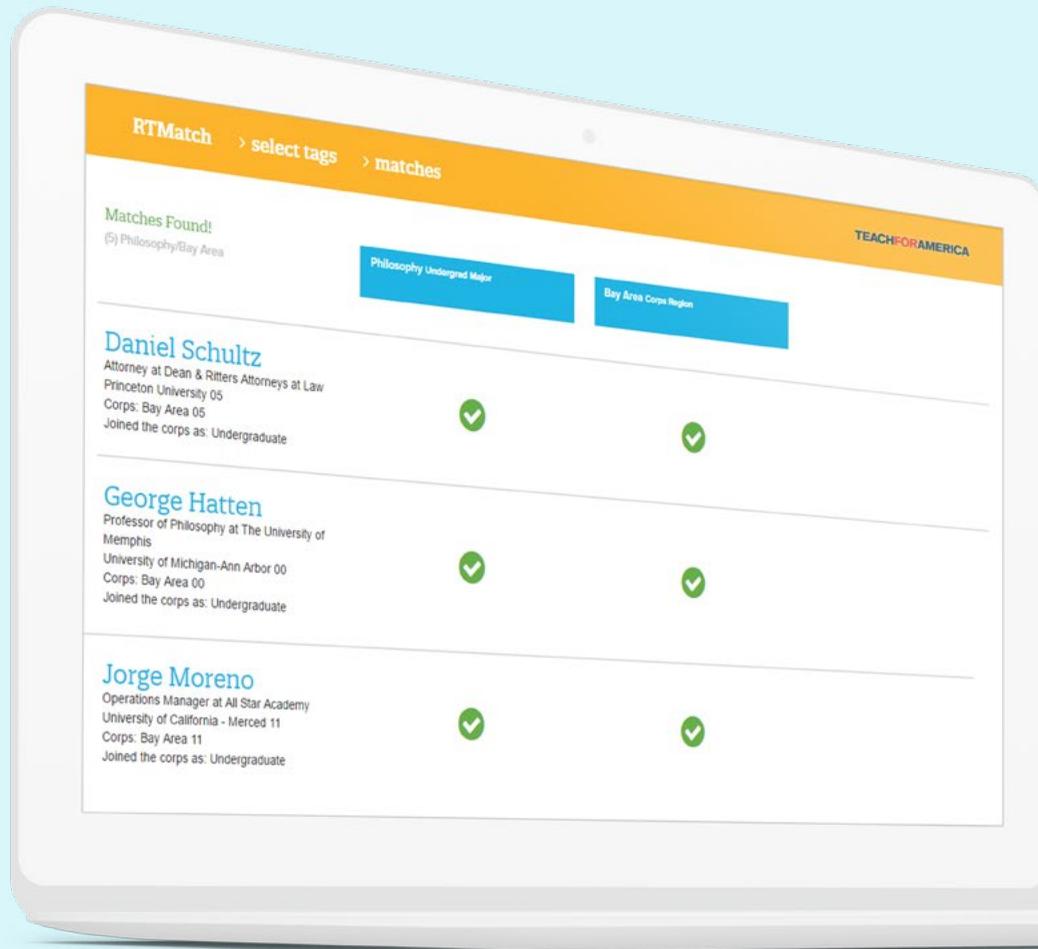
increase in service members served



TEACHFORAMERICA

FOUNDED 1990 | SIZE 1,870 Employees | LOCATION New York, NY | WEBSITE teachforamerica.org

Teach For America **brings together alumni and prospects** with a recruiting app.



There's no better advocate than a satisfied customer, and Teach For America (TFA) has put that principle to work with an alumni-based recruiter app, built on Salesforce.

TFA works in partnership with communities to expand educational opportunities for children facing the challenges of poverty. Founded in 1990, TFA recruits and develops a diverse corps of outstanding college graduates and professionals to make an initial two-year commitment to teach in high-need schools and become lifelong leaders in the effort to end educational inequity. During the 2015 school year, 8,600 corps members taught in 52 urban and rural regions across the country while more than 42,000 alumni worked across sectors to ensure that all children have access to an excellent education. In an effort to streamline communication and outreach to its network, TFA recently assessed its use of Salesforce for recruitment.





TFA recruiters were already using Salesforce to manage information about prospects, corps members, and alumni, but they learned there were other opportunities to more efficiently leverage this information.

“Recruiters would spend hours searching through Salesforce to find alums from similar geographic, ethnic, educational backgrounds to match with prospects,” said Sandeep Chellani, CIO. “This was a really inefficient process.” Teach For America was finding that some recruiters didn’t have capacity to seek out a match for every prospect, while others would match one alumnus with too many prospects, making alumni less likely to volunteer with recruitment in the future.

Chellani saw the need for a recruiter app and assigned a team of six to build a custom mobile app on the Salesforce Platform in just six weeks – in time for the new recruiting season. The new app,

called RT Match, allows recruiters to select various values, such as region or field of study, and quickly identify strong potential alumni matches for prospects. The app has intelligent search functionality that allows predictive search. “That was information that used to be handed down via email inboxes and word of mouth,” said Chellani.



“Now all recruiters have access to the same broad network of corps members and alumni.”

– Sandeep Chellani, CIO



200
member recruitment team

42,000
Teach for America alumni

6 weeks
in development

6
development team members

1,200
matches connecting prospects with alumni



Expertise, expedited: Apps are giving trailblazers a competitive edge

Professional Services

Now serving you

Professional services was made for the era of the mobile workforce. Where consultants and contractors once had to slog back and forth between on-site visits and their home offices, today's trailblazing professional services firms are using mobile apps to give every employee a 360-degree view of clients from anywhere – and connect colleagues around the world for real-time collaboration.

More and more, apps are also the product professional services firms bring to their clients. PwC, for example, created an interactive app with Salesforce that helps clients deal with an issue that challenges many companies: executive succession. In this section, you'll read about trailblazing service firms – from multinationals like PwC to regional law firms – that are reinventing themselves for the Age of the Customer.





FOUNDED 1905 | SIZE 40,000+ Employees | LOCATION Plano, TX | WEBSITE crossmark.com

OneHub app **connects the dots** around shopper engagement.

For more than a century, CROSSMARK has helped retail companies, from consumer packaged goods manufacturers to big-box retailers, reach consumers anywhere along the shopping journey from product discovery to purchase – what CROSSMARK calls “thought to bought.” CROSSMARK is a global leader in merchandising brands, creating product awareness, and nurturing customer loyalty through in-store events, product promotions, and digital shopping experiences.

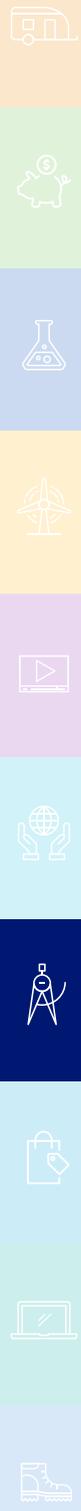
Now, with the launch of CROSSMARK OneHub, its newest app built on the Salesforce platform, CROSSMARK has deployed a new and innovative way to connect retailers, suppliers, and shoppers more closely than ever.

“Our business is all about creating connections,” said CEO Steve Schuckenbrock. “As brands and retailers face the challenges of an increasingly complex global marketplace and wonderfully informed shoppers, their need to find new ways to connect with consumers is more pressing than ever. Our connections enable us to ensure the right products are on the right shelves at the right time, so that the shopper can enjoy a unique experience that helps our retail and manufacturer customers grow. We inspire shoppers to make smart purchase decisions through engaging retailtainment and merchandising solutions.”



“There are a lot of companies that claim to have a multitenant platform that is continually updated, but I have not seen a platform that matches Salesforce.”

– Mike Anderson, CIO

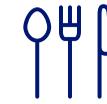


THE BUSINESS CHALLENGE

Rapidly changing retail environment and a complex network of suppliers **creates the need for a single collaborative platform**

Retailers have been faced with a dynamic, changing marketplace as shoppers shift purchasing to online and decrease in-store visits. They have sought to increase their relevancy with shoppers through localized store assortments, better in-store consumer engagement, and the integration of digital and social media into the retail experience. One of the biggest barriers to progress has been a highly fragmented supplier network and tools designed to solve yesterday's problems.

CROSSMARK recognized this need and created CROSSMARK OneHub as a central platform for driving collaboration with retailers and suppliers.



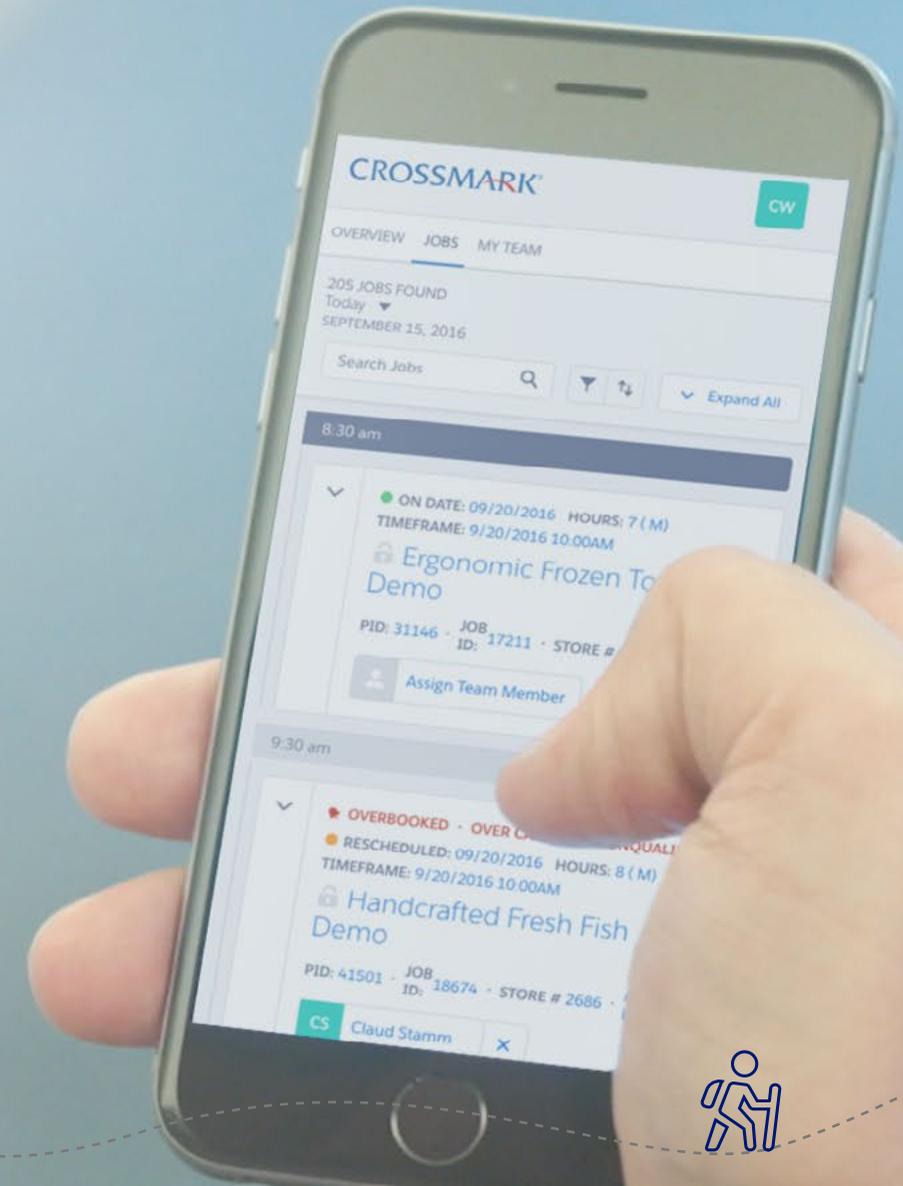
THE AHA MOMENT

A single platform could **connect every facet of the business**

As CROSSMARK gravitated toward the Salesforce platform, it started to see the benefits of creating a single platform for retailers, suppliers, and shopper experiences.

Not so long ago, almost anyone could walk into a retail store and tell the staff he or she had been sent to set up an in-store display or stage an event. Store managers were often in the dark about whether such promotions had been authorized, so the entire process could be chaotic.

Increasingly, retailers wanted more control and visibility over their stores. Suppliers wanted more insights into the impact of their promotions. And CROSSMARK saw an opportunity to address both needs with a single app that could also open the door to new ways to connect with and understand consumers.



THE APP

CROSSMARK OneHub **connects** retailers, suppliers, and consumers with a single app.

CROSSMARK OneHub, which launched in mid-2016, enables the selling, planning, execution, and measurement of in-store retail activities ranging from merchandising to reset and remodels to demonstrations and shopper engagement.

For retailers, the app offers unprecedented control over their stores and can be easily configured to their specific workflows and processes. A leading drugstore chain already has plans to put the app in the hands of thousands of store managers across the country, and other retailers are lining up to leverage CROSSMARK OneHub. By the end of 2017, Anderson projects CROSSMARK OneHub will boast up to 100,000 daily users.

For suppliers, CROSSMARK OneHub promises new insights into the effectiveness of promotions and events. By tapping into the point-of-sale data from the retailer, CROSSMARK OneHub can provide suppliers with rich data to measure the effectiveness of a specific promotion or event. Did sales of a particular product rise after an in-store event? Now a supplier can get the answer with a few clicks.

What makes CROSSMARK OneHub really exceptional is the way it leverages the full spectrum that Salesforce offers. This 100% native

Salesforce application is the culmination of everything CROSSMARK has been doing with Salesforce since 2013. Built on the Salesforce Platform, CROSSMARK OneHub integrates Sales Cloud for forecasting, Service Cloud to enable incident and case management, and Communities to connect retailers and their suppliers. To handle the massive quantity of data generated daily, the IT team employed Heroku Postgres and Heroku Connect – both Salesforce products – to ensure CROSSMARK OneHub could scale with ease.

And because it was built as a managed package, CROSSMARK OneHub can be quickly configured to the needs of any retailer or even distributed via Salesforce AppExchange.



The robust Salesforce platform **frees IT to innovate** and drive the business.

For CROSSMARK, the Salesforce platform, with its open architecture and robust ecosystem support, has been the launchpad for business transformation.

“There are a lot of companies that claim to have a multitenant platform that is continually updated, but I have not seen a platform that matches Salesforce,” said Mike Anderson, CIO. “When you combine that with Force.com and Heroku and the ability to integrate those two pieces, there’s not an application I can think of that you can’t build or extend using Salesforce.”

For CROSSMARK, the advantages of using Salesforce have played out across the company:

The new Lightning Experience, with its point-and-click tools for app building and automating processes, has been a major advantage for the CROSSMARK team as it races to build apps on tight timelines. “The two key things in Lightning that were really exciting to me were the ability to build workflow applications with a drag-and-drop feel versus writing custom code,” said Anderson, “and the ability to write applications once and they run on any device, on any screen size.”

Mobile apps built on the Salesforce1 Mobile App and Heroku have also proven transformative in a business where field reps are on the front lines, visiting retailers and working in stores. In the past, CROSSMARK staff members would go into a store with a clipboard,

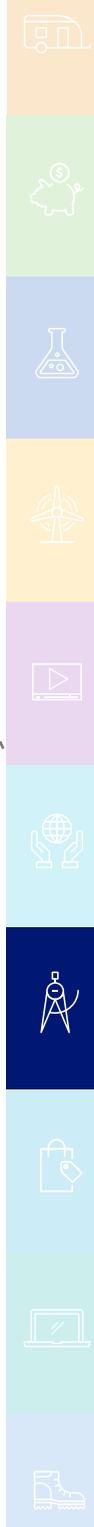
which meant that reports got filed and data processed days or weeks later. Today, data is collected on tablets and transmitted in real time so decisions can be made almost instantly.

Custom apps built on Heroku deliver rich, engaging consumer-facing applications. “One of the exciting things about Heroku is the ability to leverage the latest and greatest open-source technologies that developers really want,” said Anderson. “On top of that, I can integrate directly into Force.com with Heroku Connect and send data back and forth. It creates limitless possibilities.”



“Salesforce has helped us become a more agile company,” he said. “It used to take weeks to come back with prototypes. Now with Salesforce, our developers can build a proof-of-concept the same day and get immediate feedback and faster iteration. At one point, we joked about moving to daily sprints due to how quickly we can develop.”

That speed has allowed CROSSMARK to effectively collapse shadow IT efforts and consolidate development on Salesforce. “CROSSMARK is seen as an innovator in our industry,” said Anderson, “and innovative companies use Salesforce.”



App Spotlight

App Name

CROSSMARK OneHub

What is it?

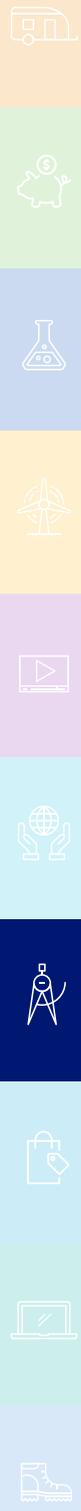
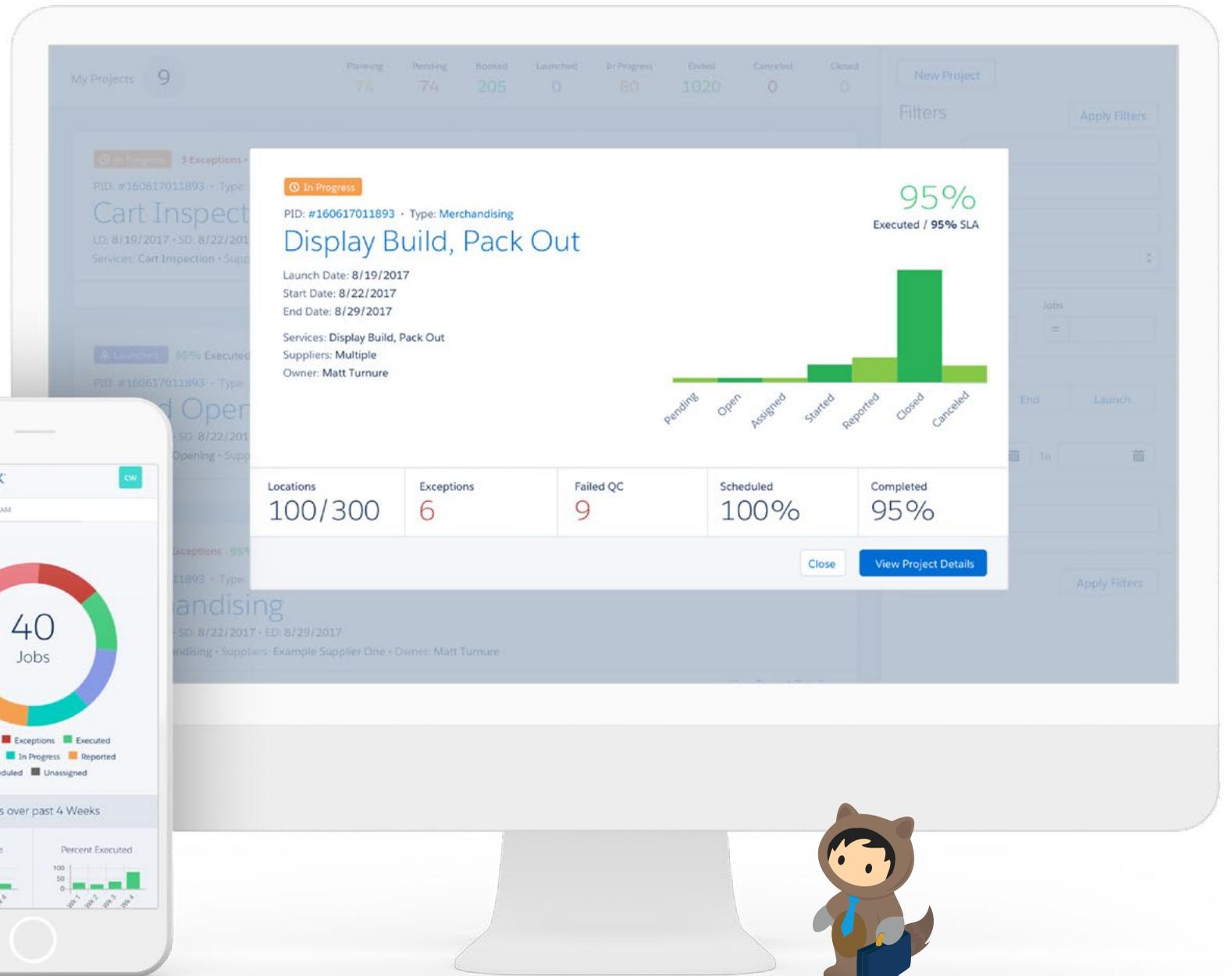
A 100% native Salesforce app that manages the selling, planning, execution, and measurement of in-store retail activities, connecting brands, retailers, and shoppers.

What does it do?

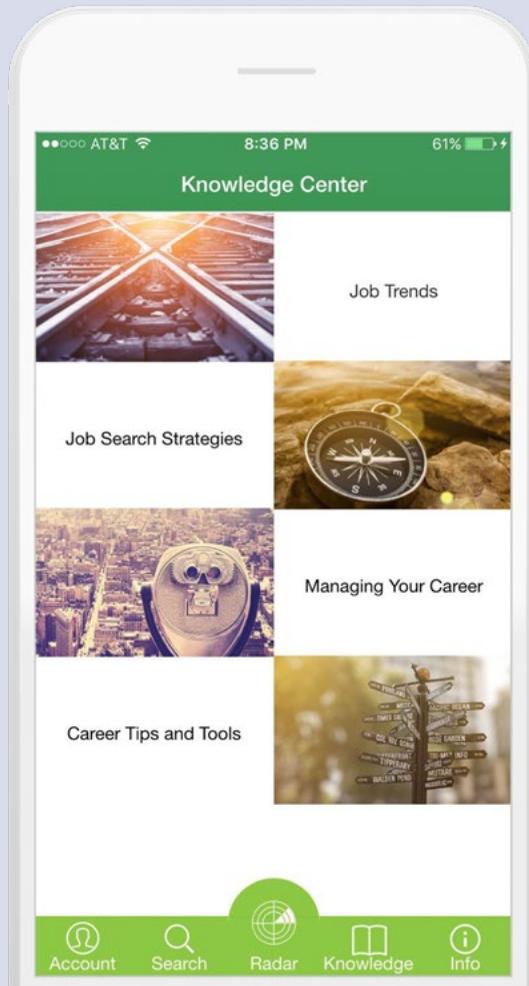
Gives retailers newfound control over what goes on in their stores and gives suppliers new insights into the effectiveness of in-store promotions, demos, and events, and gives both retailers and suppliers unprecedented visibility into the impact of in-store promotions on sales.

How was it built?

Built on the Salesforce Platform with Force.com, Communities, Heroku Postgres, and Heroku Connect in under 90 days.



A mobile app **connects millions of job seekers** with employers across the country.



Job hunting can be a stressful and isolating experience. A mobile app that's linked to social media can go a long way toward making the search more efficient and less lonely. The Kelly Career Network app, built on the Salesforce Platform, has given 1 million job seekers that critical connection to employers through their smartphones.

As a global provider of workplace solutions, Kelly Services has been matching employers with job seekers for more than 70 years. The company's growing focus on professional and technical jobs made the addition of mobile capabilities a must for its online Kelly Career Network. "We're talking about doctors, nurses, computer engineers, mechanical engineers," said James Anderson, Senior Manager, Front Office Apps and Salesforce.



"These are people on the go, people on the run, and they have big expectations. If you don't have a mobile offering, you're not even in the conversation."

– **James Anderson**, Senior Manager, Front Office Apps and Salesforce

Originally launched as a desktop app in 2012, the Kelly Career Network has always used Salesforce as its platform because of its easy integration with Kelly Services back-end systems. It is a complete end-to-end recruiting application that allows applicants to search for specific jobs, find jobs matching their selected criteria, and pay their application fees right through the app. Push





notifications and badges drive user engagement, and users can build their candidate profiles through Facebook, LinkedIn, and other social media accounts.

On the back end, the app offers Kelly Services employees a 360-degree view of their customers' preferences, with metrics for everything, including favorite social media sites, favorite job posts, and how many resume submissions each network member has completed. Today, 40% of Kelly Services Network traffic originates through the mobile app.

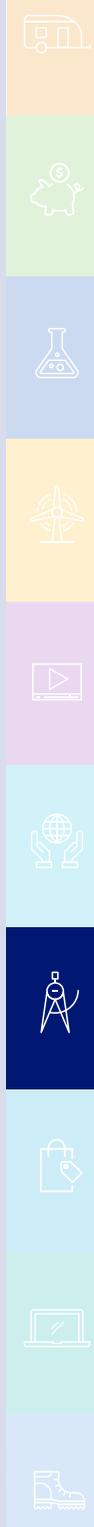
The people who benefit the most, said Anderson, are the growing ranks of employees without access to a desktop computer at work. "As time went on," he said, "we gained a better understanding of our customers and realized we needed a mobile solution for warehouse workers, help desk associates, and others who could only access the website from home at night."



1 million
job seekers

40%
of users via mobile

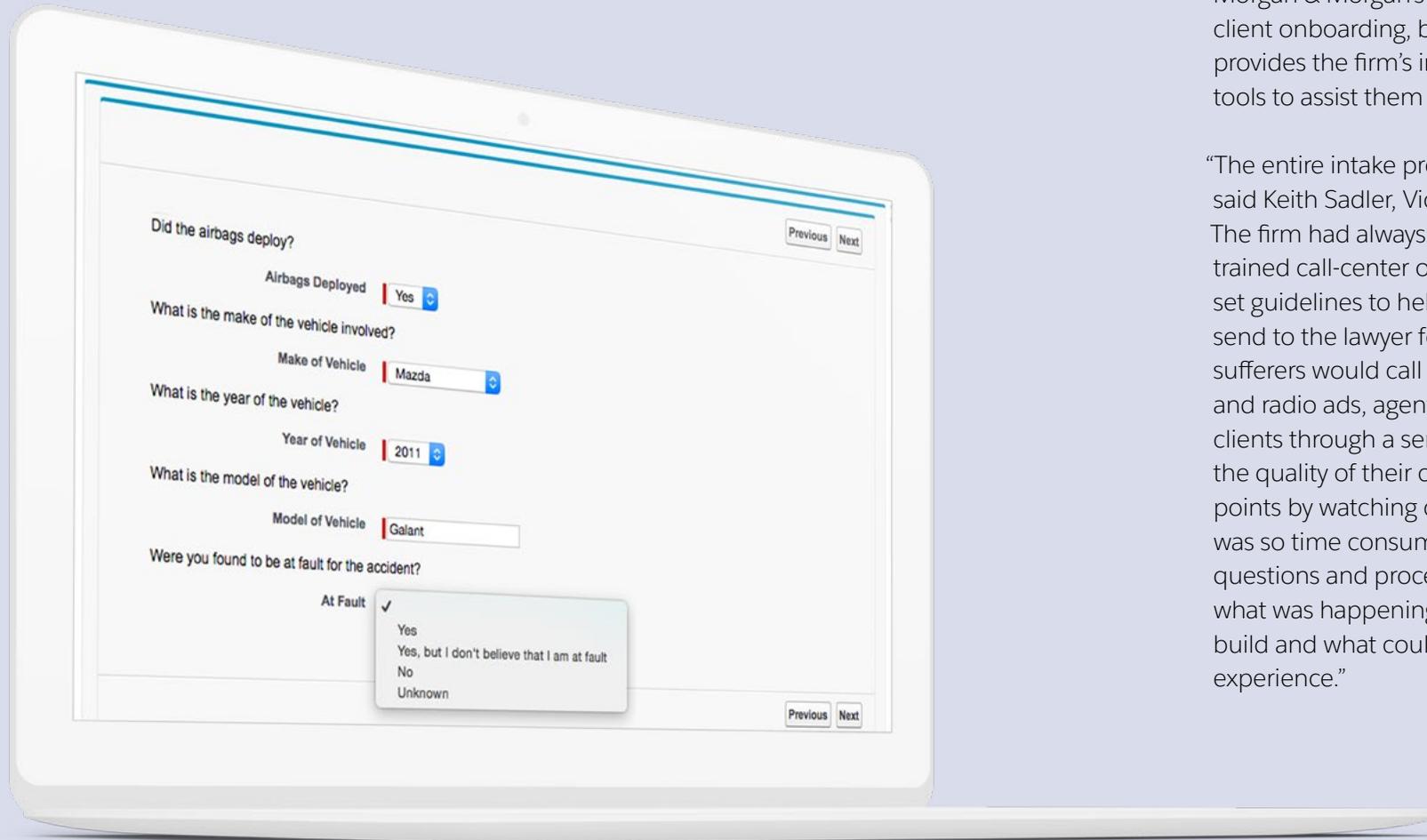
2 developers
built the app





FOUNDED 1988 | SIZE 1,700+ Employees | LOCATION Orlando, FL | WEBSITE forthepeople.com

A law firm makes the case for streamlining the intake process.



For many plaintiff law firms like Morgan & Morgan, every case the firm chooses to represent requires an investment that can't be recouped unless the case is successful. So how the team assesses and chooses cases can prevent costly mistakes. Morgan & Morgan's custom application for new client onboarding, built on the Salesforce Platform, provides the firm's intake agents with powerful tools to assist them with screening new client calls.

"The entire intake process is an art and a science," said Keith Sadler, Vice President of Platform. The firm had always operated with a team of trained call-center operators who worked with set guidelines to help determine which cases to send to the lawyer for further review. When injury sufferers would call the firm, prompted by TV, print, and radio ads, agents would walk these prospective clients through a series of questions to determine the quality of their cases. "We knew the main pain points by watching calls come in," said Sadler. "It was so time consuming, with so many redundant questions and processes. Witnessing firsthand what was happening told us what we needed to build and what could deliver an even better client experience."





The development team in New York worked with the business and intake unit in Orlando to develop a computer-telephone integrated (CTI) Intake Management app that guides agents through visual workflows and shows relevant questions to ask each caller. The app now helps gather the data in a user-intuitive way to decide if they should pursue the matter or not. The app also helps the firm improve the initial client experience and can send a contract electronically, or use a custom dispatch system to assign appointments for investigators to meet with clients. The first CTI was designed, built internally, and deployed in six weeks. A second app, for another group of 60 users, also took just six weeks to build.

The improvements in efficiency have been dramatic. Training costs have dropped because the agents are now empowered with a tool to help guide the initial intake experience. The app also

ensures greater quality control in terms of oversight and standards in the decision-making process. And the client experience is much improved, with faster screening and far less paperwork.



“We’re continuing to grow and roll out Salesforce to as many business units as possible. We’re looking to be wall-to-wall.”

– **Keith Sadler**, *VP of Platform*

6 weeks
to build and deploy the app





FOUNDED 1998 | SIZE 208,000+ Employees | LOCATION London, U.K. | WEBSITE pwc.com

PwC takes the pain out of the executive succession process.



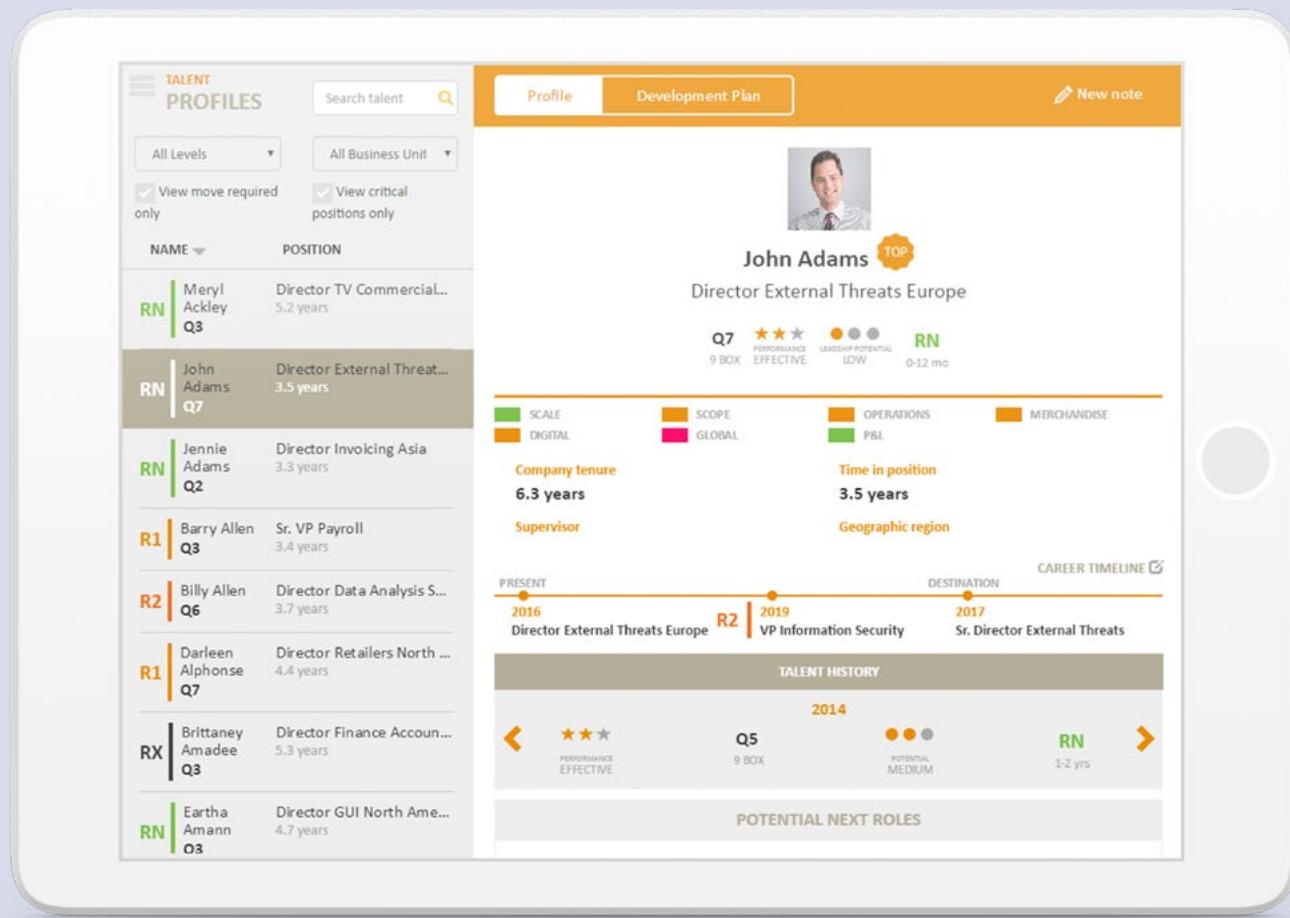
Corporate succession at the executive level can be risky: Changing leadership can destabilize a company from the top down, affecting hiring, retention, even stock prices. It's also costly, with an estimated \$100 billion in market share lost annually to unplanned leadership changes. Yet, a 2015 U.S. Trust survey found that two-thirds of business owners don't have a succession plan in place. Another survey found that only half of North American companies are grooming replacements for their CEOs.

Top global accounting and consulting firm PwC advises businesses of all sizes – from family-owned businesses to enterprises – in executive succession planning. To get its clients out ahead of the curve and proactively manage such transitions, PwC has partnered with Salesforce to build the Executive Succession Planning app.

 “Almost all the organizations I talk to are killing large numbers of trees for binders and spreadsheets to manage the succession process.”

– Elizabeth Yates, Partner

By shifting to an app, she pointed out, succession planning can become “a very dynamic, innovative, ongoing process where they can have access to data they didn't even know existed, and where they can use the data in a way to think about the succession



process that becomes a part of how they lead and manage teams.”

With the Salesforce Platform, PwC built an interactive succession-planning app in just five weeks, with another three weeks for iterating, refining, and polishing the final product. The cutting-edge user interface is designed for 85-inch touchscreen panels and is optimized for tablets and smartphones. The app’s talent profiles track employee work history, education, career interests, and geographic regions, while flagging top performers and presenting development paths for guiding employees to their next likely roles in the company.

“It shows what training and development people need,” said Ian Kahn, Partner. “It shows what experiences they are lacking, what they are really good at, and includes respective objectives.”

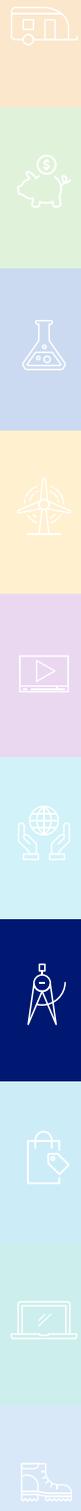
The app even has a Future State feature to predict the outcome of employee moves on the company. The company can shuffle employees around and analyze the results of a number of different moves. Once the most desirable arrangement is found, users can pull reports and make plans to reach that Future State in reality.

The results: Clients love the app, with one of the world’s largest retailers planning to roll it out to all of its global locations.



5 weeks
development

3 weeks
iteration and testing





How trailblazers are creating a personal shopper for every customer

Today, the customer is the center of the retail universe. Connected, digitally savvy consumers who pre-shop online, pay with mobile devices, and expect delivery within an hour have overturned the old model in which brands dictated the story and brick-and-mortar storefronts were the ultimate destination.

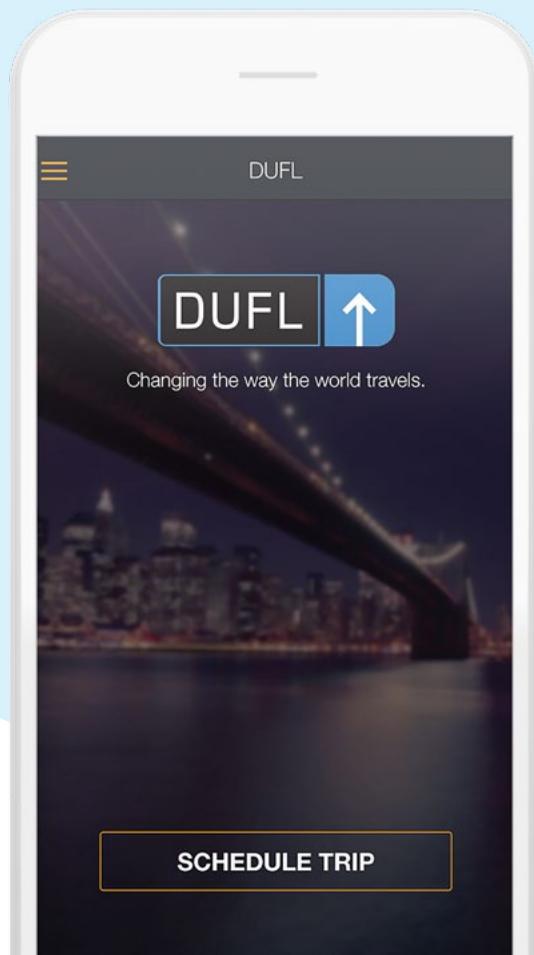
That's why trailblazing retailers are changing their business model to be customer-first, customer-fast, customer-connected. In this section, you'll discover retail brands leveraging customer data to deliver more personalized shopping experiences and customer engagement that can happen anywhere, anytime. Apps that connect all relevant customer data, and make that available to the customer – and to sales associates – in real time, deliver on the true promise of experiences that feel personal, bespoke, and compelling.





FOUNDED 2015 | SIZE 25 Employees | LOCATION Tempe, AZ | WEBSITE dufl.com

This app offers freedom from airport baggage hassles.



DUFL makes an offer to air passengers that's almost too good to be true: You can travel the globe without ever having to pack, carry, or check your bags. The Arizona-based company helps people achieve this extraordinary feat by shipping their prepacked bags to their destinations – and by managing all the tasks involved through more than a dozen apps running on Heroku from Salesforce.

DUFL maintains a closet at its warehouse for each customer to store travel clothes and toiletries. After customers select items online from their personal closets, DUFL staffers pack everything and ship their bags to their destination. When they're ready to head home, the service returns the bag to the DUFL warehouse, where their clothes are cleaned and stored for their next trip. According to a *Fortune* article, Co-Founder and Chief Marketing Officer Andrea Graziani said 89% of DUFL's approximately 10,000 users report that the service is life-changing.

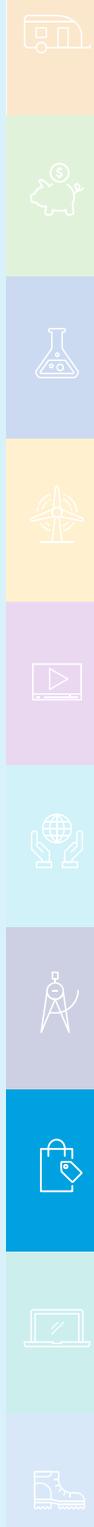
Prior to the company's public debut in 2015, CTO and Founder A.J. McGowan's previous experience with Heroku assured him that the platform could be deployed rapidly and would integrate easily with AWS features.

 **“Heroku’s flexibility allowed us to quickly build the DUFL service and integrate the third-party services that we wanted.”**

– A.J. McGowan, CTO and Founder

When existing warehousing technologies didn't fit DUFL's model, Heroku made it easy for DUFL team members to add inventory management and logistics systems they developed themselves.

DUFL's mobile and web clients are connected to Salesforce and a back-end warehouse system. “With Heroku, we don't have to hire DevOps staff. We can run our entire stack through the Heroku dashboard,” said Nick Maultsby, Head of Engineering. DUFL's modular architecture allows Maultsby and his team to easily scale their stack horizontally. The company also runs internal tools





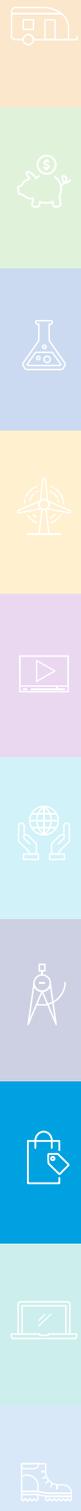
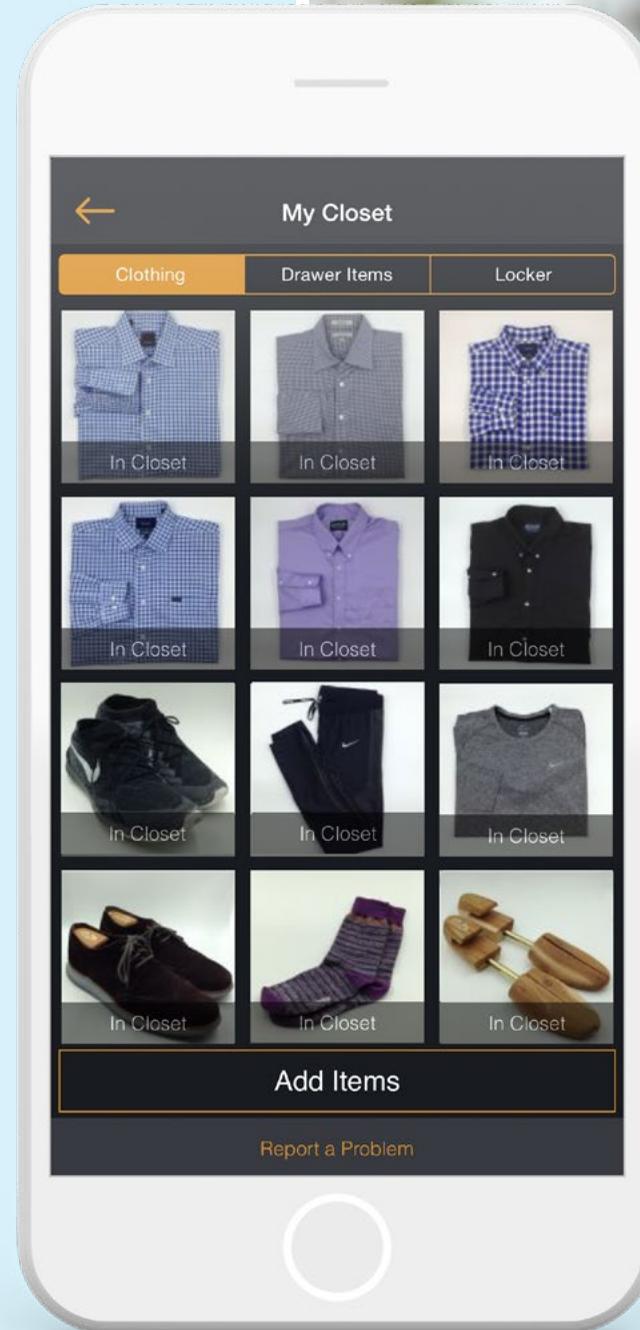
on Heroku, which has helped maintain a lean staff size at the startup.

Scalability is now the engineering team's focus, as DUFL expands its services into serving sports-minded travelers who would rather avoid lugging their favorite skis, snowboards, golf gear, and other recreational equipment through airports. At a price not so different than airline baggage fees, DUFL members will enjoy the luxury of having those items waiting for them on the slopes or at the club when they arrive.

10,000
users

23 countries
where DUFL clients travel

817 cities
worldwide



Cleanup on Aisle 4 – how a supermarket delights shoppers with highly personalized promotions



Marsh Supermarkets has a long tradition of using technology to gain a competitive edge. Even as far back as June 1974, a Marsh store in Troy, Ohio, historically rang up the first-ever sale with a barcode scanner – a 6-cent pack of gum. Today, the Marsh mobile shopping app on the Salesforce Platform is among the regional chain’s key strategies for gaining customer loyalty.

Marsh’s previous experiences with web app providers had been disappointing. The apps proved to be generic in design, lacked customizable features, and failed to provide the user experience that Marsh executives wanted for their customers. In 2015, Marsh engaged Heroku partner Taqtile Mobility to produce an app that includes features such as store finder, loyalty cards, mobile coupons, and customized content based on user and location. The new app is rich in graphics, and it allows shoppers to navigate quickly through weekly

ads and organize coupons by priority, date, or value. “The app is a delight to use,” said Tim White, Senior Vice President of Marketing. “It is richer, more responsive, and more engaging than anything that the big chains have produced.”

Shoppers can create personal shopping lists by selecting from more than 18 product categories. With Heroku powering the back end, when a shopper enters the name of an item, the app reveals that item’s location, depending upon which of Marsh’s 100 grocery stores and 41 pharmacies the shopper is visiting.

The new app was an instant hit with shoppers, quickly eclipsing the meager adoption rates of Marsh’s previous mobile offerings. Within two months of the new app’s launch, the user numbers had more than doubled, and the level of engagement within the app continues to climb.



“The benefits of such an app to a small company competing with large chain stores are significant,” said White.

“Our mobile presence is as feature-rich as the big stores, but without significant cost.”

– **Tim White**, SVP of Marketing

100

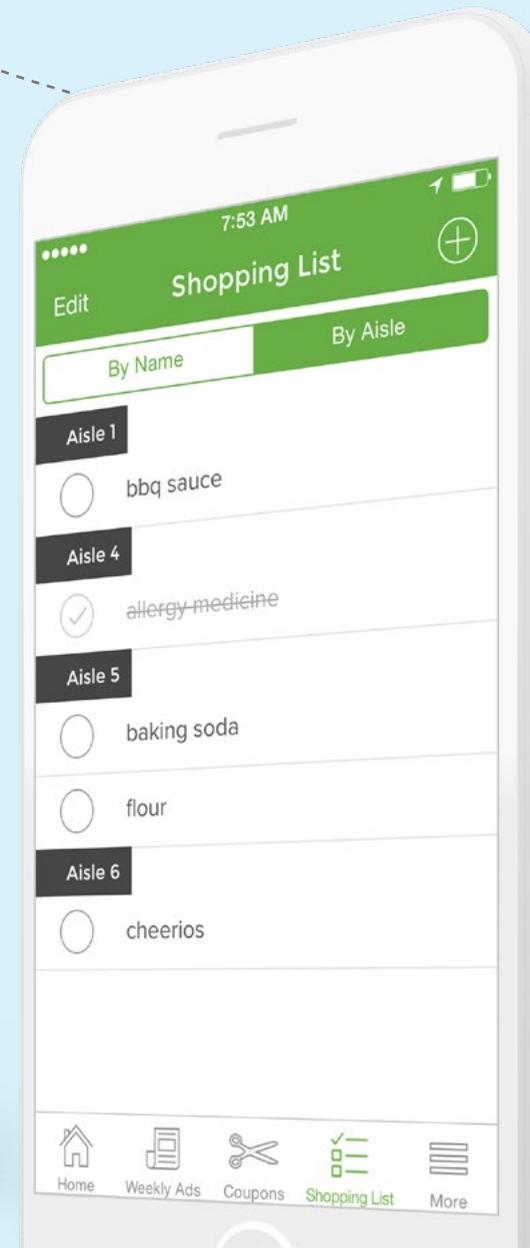
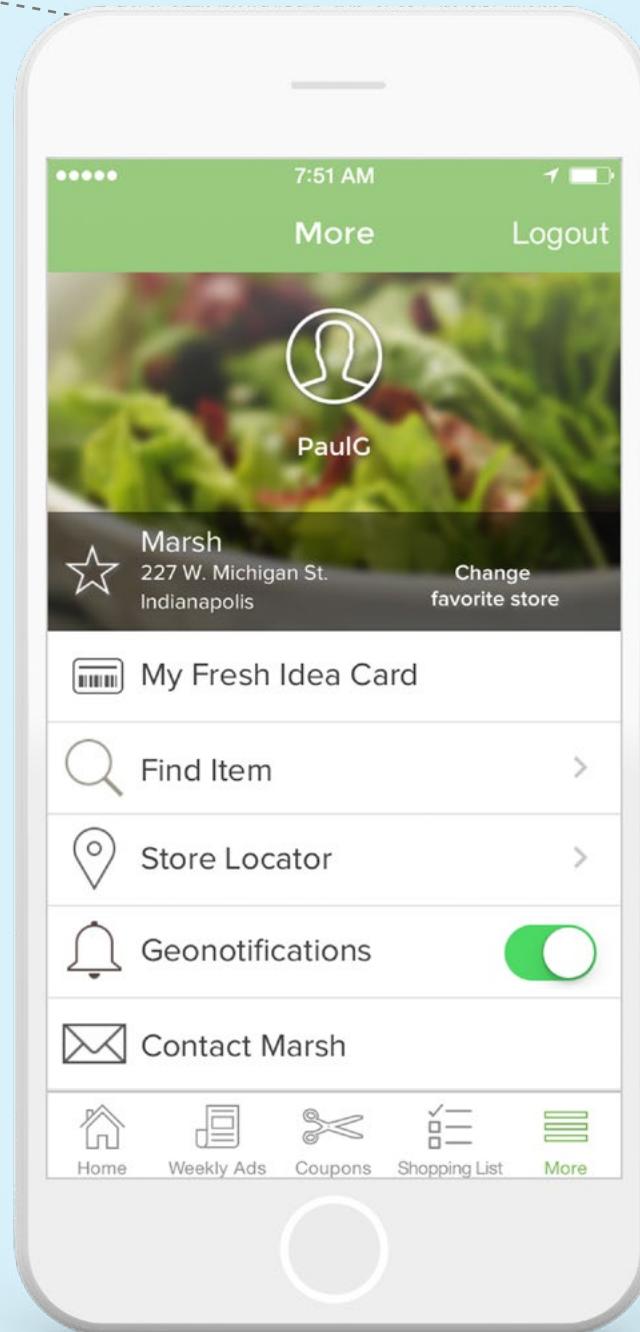
grocery stores

41

pharmacies

2x

user growth within two months of launch





FOUNDED 2000 | SIZE 11,000 employees | LOCATION Hatfield, U.K. | WEBSITE ocadogroup.com

The world's largest online-only grocer **delivers fresh apps** to grow its business.

So many of today's disruptive brands focus intensely on their customers. Often left behind in this technological revolution are the employees themselves who struggle to provide excellent service while saddled with out-of-date systems.

Take Ocado, for example. As the world's largest pure-play online grocery retailer, with more than 500,000 active customers, Ocado is both an industry disrupter and an innovator. In November 2015, the retailer reported an 18% increase in year-over-year sales and was named "Online Supermarket of the Year" in the 2016 Grocer Gold Awards. Ocado now reaches more than 70% of U.K. households, with 55% of orders completed using a mobile device.

"Our business is all about making the process of grocery shopping as simple and convenient as possible for our customers," said Paul Clarke, Chief Technology Officer. "We want to give customers back the time they would have spent in a supermarket."

For Clarke, the customer-facing projects at the top of the innovation to-do list had brought them closer to their goal. But to truly realize the company's vision, Clarke and team needed to transform Ocado's internal processes. Clarke explained: "We needed to prepare ourselves for significant future growth, and that meant building apps to help our people work more efficiently."



“With Salesforce, we are in control of our own apps and our own destiny.”

– Paul Clarke, CTO





THE BUSINESS CHALLENGE

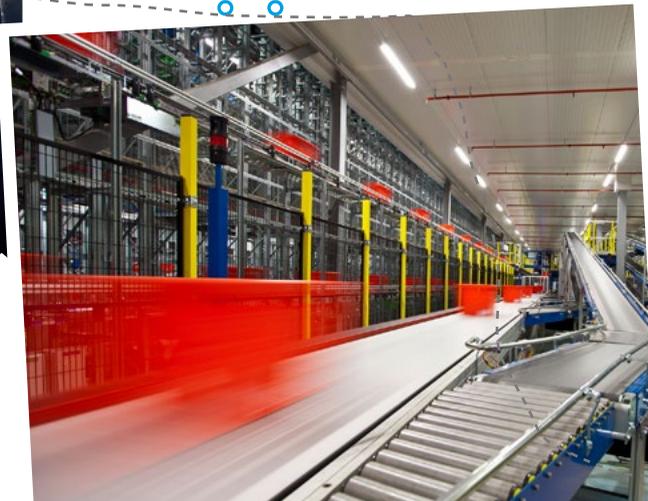
Finding the bandwidth **to build innovative apps** for employees

Despite recruiting new developers to join his 900-strong software engineering team, Clarke struggled with IT resources to create employee solutions in a company where the customer-facing app or solution was always the first priority.

“There was always a backlog of new internal business initiatives,” he said. “We needed to take an alternative approach.”

Instead of relying on developers to build internal apps, Clarke wanted to empower the company’s business analysts to get involved. He also wanted to build apps quickly and cheaply, so they could be used for one-off events or campaigns.

This didn’t just mean that Clarke needed a great out-of-the-box solution or set of apps, he also needed a solution where others could do something without a lot of IT help. It had to have an easy drag-and-drop function, as well as be scalable, trusted, and secure.



THE SOLUTION

Empowering line-of-business employees to build their own apps

For Ocado, the answer to driving better employee experiences started with Salesforce. An analyst was asked to learn Force.com from scratch and build the first three apps. It took the analyst just six weeks.

Expenses claims, project lifecycle management, health and safety training, and facilities management are just some of the internal processes being revamped with apps built on the Salesforce Platform. For example, the “What’s Broken” app enables staff to report issues with faulty furnishings and equipment, such as a vending machine or a carpet tile, at any of Ocado’s locations.

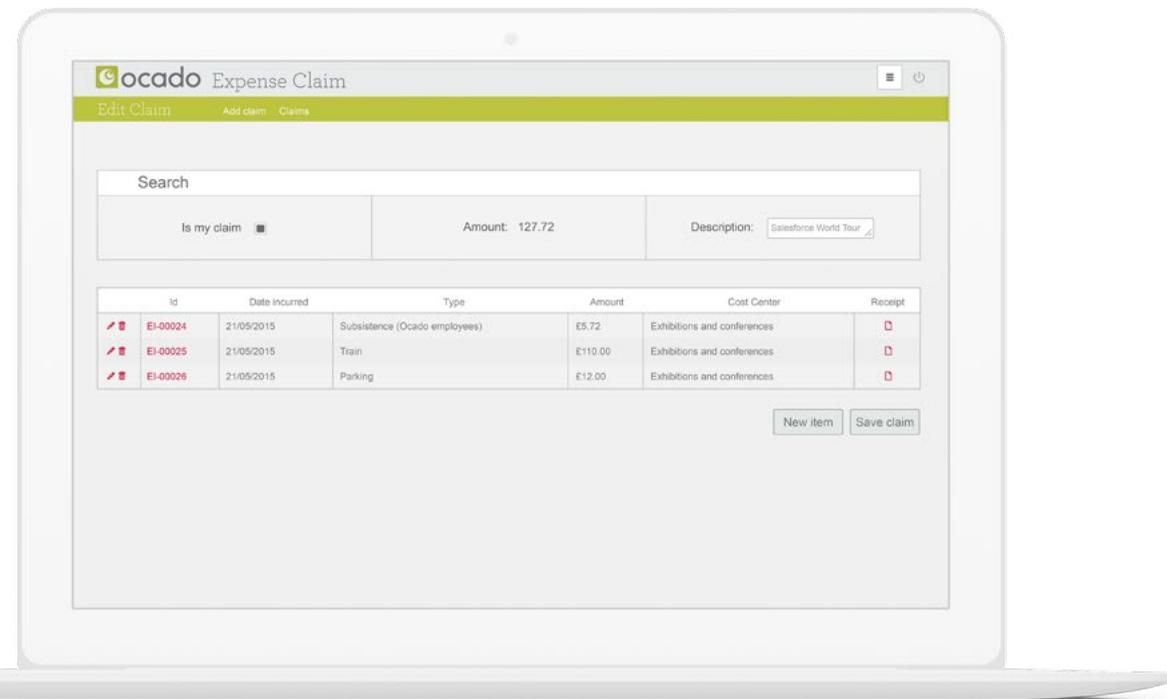
To ensure issues can be logged remotely, Clarke and his team use the Salesforce1 Mobile App. They can pass issues from the What’s Broken app to Ocado’s facilities management help desk, which uses Salesforce Service Cloud to track issues through to resolution.

The IT help desk also manages around service cases with Service Cloud. “Every morning, I get a summary of any incidents and their status in real time,” said Clarke. “In the past, we had to wait until the end of a shift for a report to be created, which would be out of date by the next day.”

To simplify problem resolution, Clarke and his team plan to bring together all Ocado’s IT knowledge resources into a single database hosted in Service Cloud.



“Instead of having to look at different wikis or track back through email threads, the support team will have a wealth of up-to-date knowledge resources at their fingertips,” says Clarke.





NEXT UP

Sharing the power of innovation with Ocado's suppliers



With Ocado customers and employees already benefiting from app innovations, Clarke is now turning his attention to the retailer's supplier community.

In addition to selling groceries, Ocado offers hundreds of its own label products – from fruit and fish to dips and dairy. These products are sourced from more than 200 suppliers. “For every product, we need to capture a wealth of metadata. Every time there's a change to an ingredient, it needs to be approved by our buyers and food technology teams,” said Clarke.

To bring everyone on the same page, Clarke and his team are developing an app on the Salesforce Platform and Community Cloud, which will be used by both suppliers and the retailer's in-house team.

Ocado uses a mix of Salesforce Platform development features – including Lightning, Visualforce, and drag-and-drop capabilities – to help make ideas like the supplier community become a reality.

“With Salesforce, we get the best of both worlds: We can use simple or sophisticated development techniques,” said Clarke. “The reporting, permissioning, security, and APIs that come out of the box mean we don't have to start from scratch every time.”

To make sure business analysts make the most of these and other Salesforce features, Clarke plans to use Trailhead, which provides guided learning via interactive online tutorials. “With Trailhead, people will be inspired to learn and play with the Salesforce platform. It will help us onboard new analysts faster,” he said.

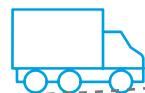
Creating a living **app ecosystem**

As the £1 billion retailer builds more internal apps, user feedback and analytics will become increasingly important. “For us, the story doesn’t stop with deployment,” said Clarke. “We want to create a living app ecosystem that is constantly improving. We want users to be able provide feedback, suggest ideas, and feel engaged in the ongoing development process.”

Ocado is currently busy building the Ocado Smart Platform (OSP) – the fusion of its end-to-end e-commerce, fulfillment, and logistics solution rewritten to run in the cloud – and a new modular and scalable hardware platform for building its highly automated warehouses. The company plans to use OSP not only to replatform its own U.K. businesses but also to provide large brick-and-mortar retailers around the world a shortcut to moving online. The ecosystem of internal apps that Ocado is building on the Salesforce Platform mirrors this external platform strategy and offers Ocado the opportunity of making these internal apps available to its OSP customers.

 “With Salesforce,” says Clarke, “we can turn our ideas for internal apps into reality for our people a lot faster.”

According to Clarke, it’s about not just being able to evolve, but evolve quickly – with the resources he has. “For us, staying disruptive is all about acceleration rather than velocity—how to ‘get better at getting better’ or ‘how to innovate the innovation factory.’ As we continue to grow fast, we need to drive efficiency, scalability, and sustainability. But as the saying goes, ‘The cobbler’s children have no shoes.’ Like many technology companies, however fast we recruit engineers, there is an endless backlog of customer- and production-facing projects that take priority over developing new internal business applications.”





Q&A with Paul Clarke, Director of Technology at Ocado

Q: *Tell us about how Ocado is changing what it means to be a retailer.*

A: Technology is at the core of almost everything Ocado does. Our vision and culture are much closer to technology companies such as Google or Salesforce than a traditional brick-and-mortar retailer. Our customers place their orders online via our online store or mobile apps. These orders are then picked and packed in our highly automated warehouses (the largest of their kind in the world), before being delivered to customers' kitchen tables in one-hour delivery slots by our own delivery fleet.

Q: *What is Ocado Technology and how does it drive your business?*

A: Our business is all about making the process of grocery shopping as simple and convenient as possible for our customers. However, that simplicity is delivered by an enormous amount of complexity and technology under the surface.

Ocado is powered by a huge collection of software technology, almost all of which is built in-house by my division, Ocado Technology. What we do here is not IT, it's technology in the true sense of the word and our technology estate is very broad and deep – real-time control systems, robotics, machine learning, simulation, data science, forecasting systems, routing systems, inference engines, big data, and so on.

Q: *What made you look at Salesforce?*

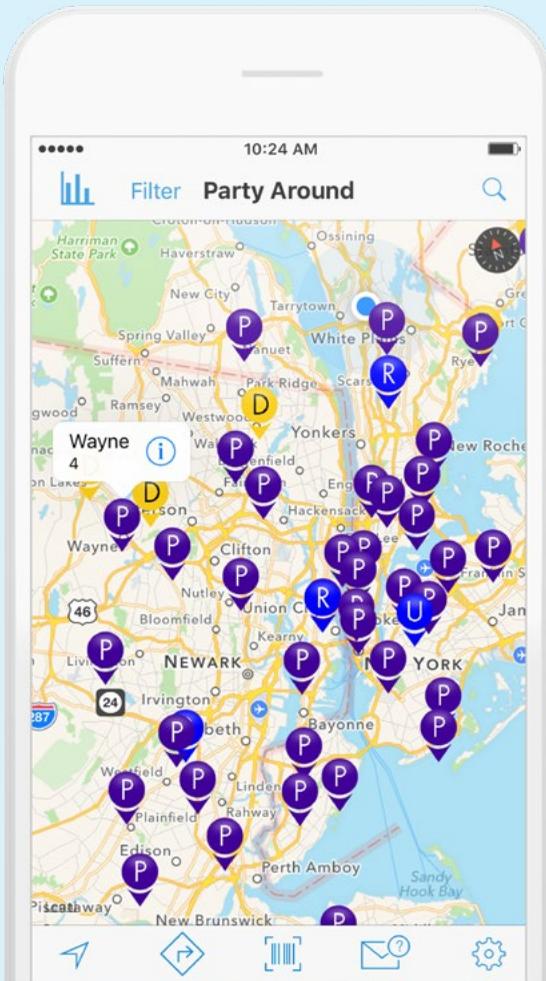
A: We decided we needed a development platform that would allow analysts to build most of these applications without software engineers getting involved. We also wanted to facilitate building short lifetime applications quickly and cheaply, such as you might need to manage a one-off event or campaign. Finally, we wanted a platform that provided for free the sort of stuff that often gets left out of internal applications such as security and permissioning, reporting, APIs, integration between applications, and release engineering.

Q: *How has the Salesforce Platform been a solution for your team? Can you share what you have built so far?*

A: Salesforce has provided incredible commitment and support through the decision and evaluation process. During our evaluation phase, we decided to give one of our analysts the challenge of learning the Salesforce platform from scratch and then building three of the applications from our backlog: expenses, project lifecycle management, and reporting defective equipment and facilities. The objective was to assess the scale of the learning curve and the functionality of the platform. From knowing nothing about Salesforce, it took him six weeks to learn Force.com from scratch and build the first three apps.



How to **pull off the perfect party every time** — at 850 locations nationwide



Retail is detail, as the saying goes, and for executives at Party City, an app built on the Salesforce Platform provides them detailed KPI data and virtual photographic walk-throughs for all 850 of their North America store locations.

To keep track of what was happening at their stores, Party City executives used to lug around binders with financial data during store visits.



“Now it’s all in the cloud and accessible through the app on their phone. For the first time, they have instant access to all key metrics needed to control and manage profitability of each and every store. And the data is up to date and consistent.”

— Steve Skiba, CIO

Field management and executives can make decisions on the fly about real estate, store design and floor plans, payroll roster, salaries, and hours to improve the overall financial outlook of each store, according to CIO Steve Skiba. The real value is the cloud-delivered data and the app’s view into that data. With five years of each store’s detailed financial information, sales by Plan-O-Gram, and annual financial statements instantly available, executives have access to the information needed to drive their business in today’s fast-paced retail environment.

Gregg A. Melnick, Party City’s president, proved to be a champion of the app in its development phase and continues to serve as a creative force behind its design and functionality. Skiba’s team has released new functions in the app every 30 to 45 days in a series of sprints over the course of two years.

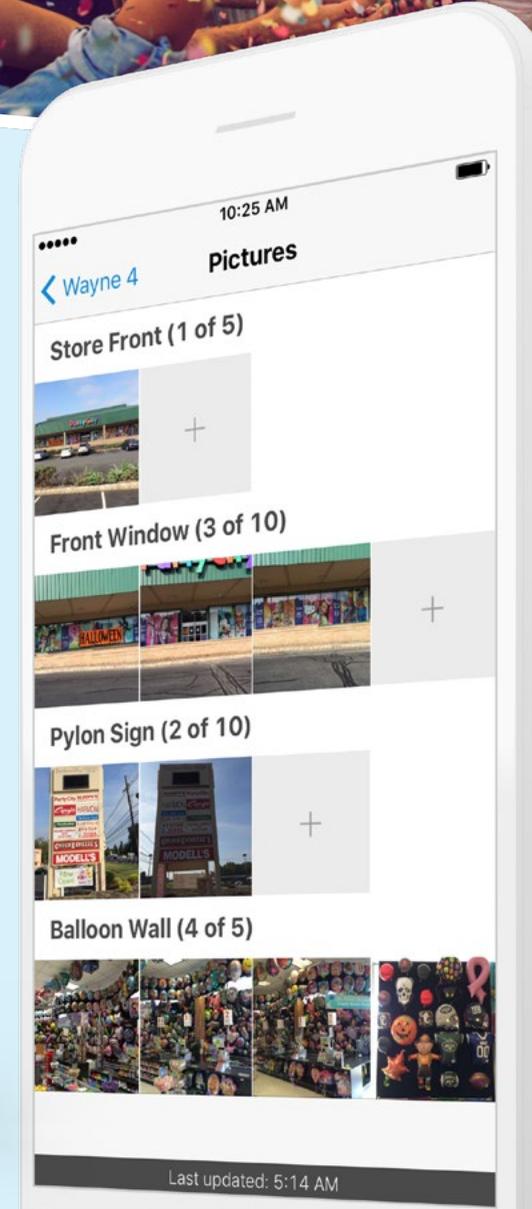
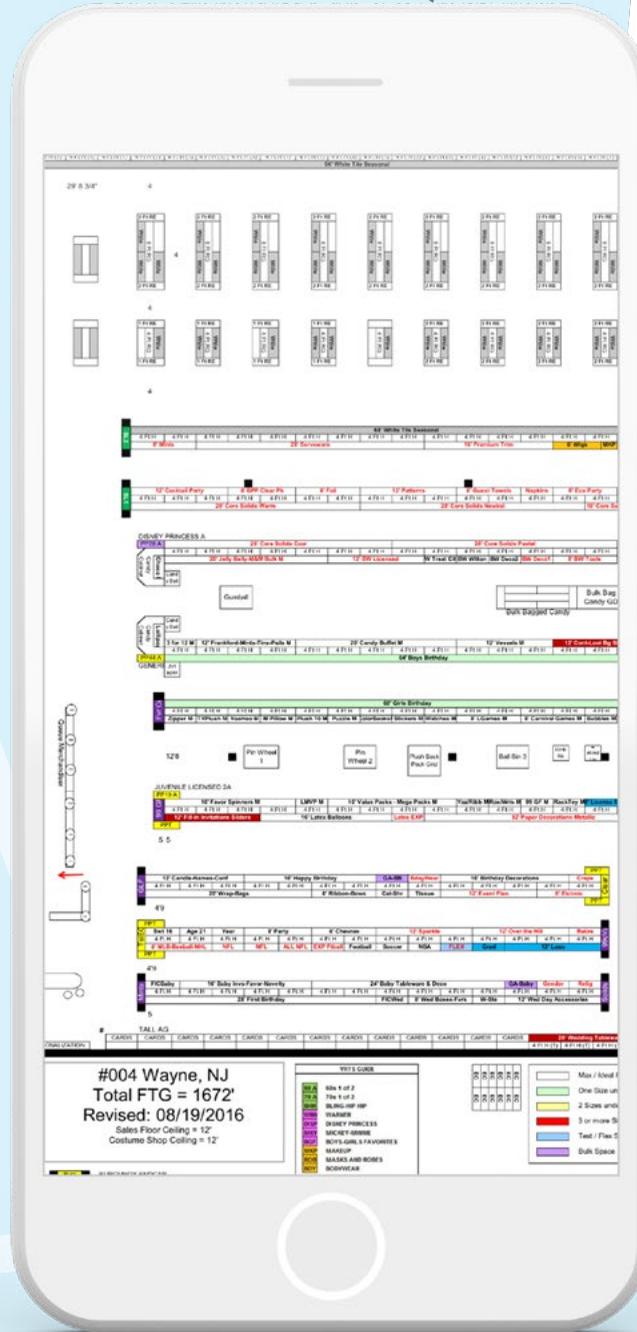




A total of approximately 100 executives, from the CEO down to district and regional managers, rely on the app for daily views of retail operations. Plans are in the works for expanding the app to the wholesale side of the organization.

850
stores in
North America

100+
top executives
using the app





FOUNDED 1969 | SIZE 29,000+ Employees | LOCATION Greenwood Village, WA | WEBSITE redrobin.com

Red Robin builds a **next-generation loyalty platform** as innovative as its menu.



Red Robin, the national restaurant chain known for its gourmet burgers and boozy shakes, wanted to break from the tried and true when it designed its Red Robin Royalty program – a multidimensional approach to customer loyalty. The program offers standard rewards – such as free burgers or limited-time offers – as well as exclusive rewards tailored to the individual.

Red Robin executives understood that the secret sauce behind a successful loyalty program was the right technology. To realize its vision of a unified system, the Red Robin team developed a new architecture centered on Salesforce and the Heroku platform, leveraging Heroku Connect. This approach gave the company the stability, scalability, and performance it needed to deliver a great

customer experience to millions of Red Robin Royalty program members. It also ensured the internal teams had ready access to all the member profiles data they needed, with a single point-of-truth view for each customer.

Members can access their Red Robin Royalty account on the web or on their iOS or Android device. They have a full view of all their accrued benefits, plus any news, events, or special deals specific to their profile and preferences – for example, their nearest restaurant location or their family status.

The customer-facing program experience is built on Heroku, with the user experience being delivered as a responsive HTML app. The app experience has improved in subtle but important ways – everything is snappier and more reliable. And, with the stability and scalability problems solved by Salesforce and Heroku, the team has put major updates to its iOS and Android clients on their roadmap for the near future.

The development team building all this was small, about five developers for the bulk of the

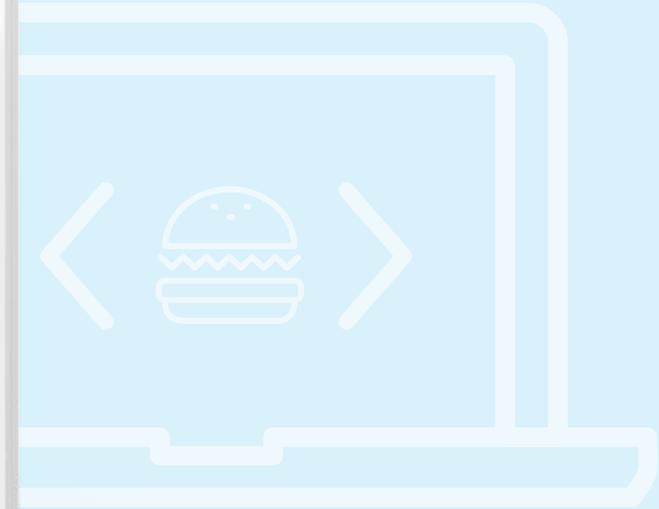
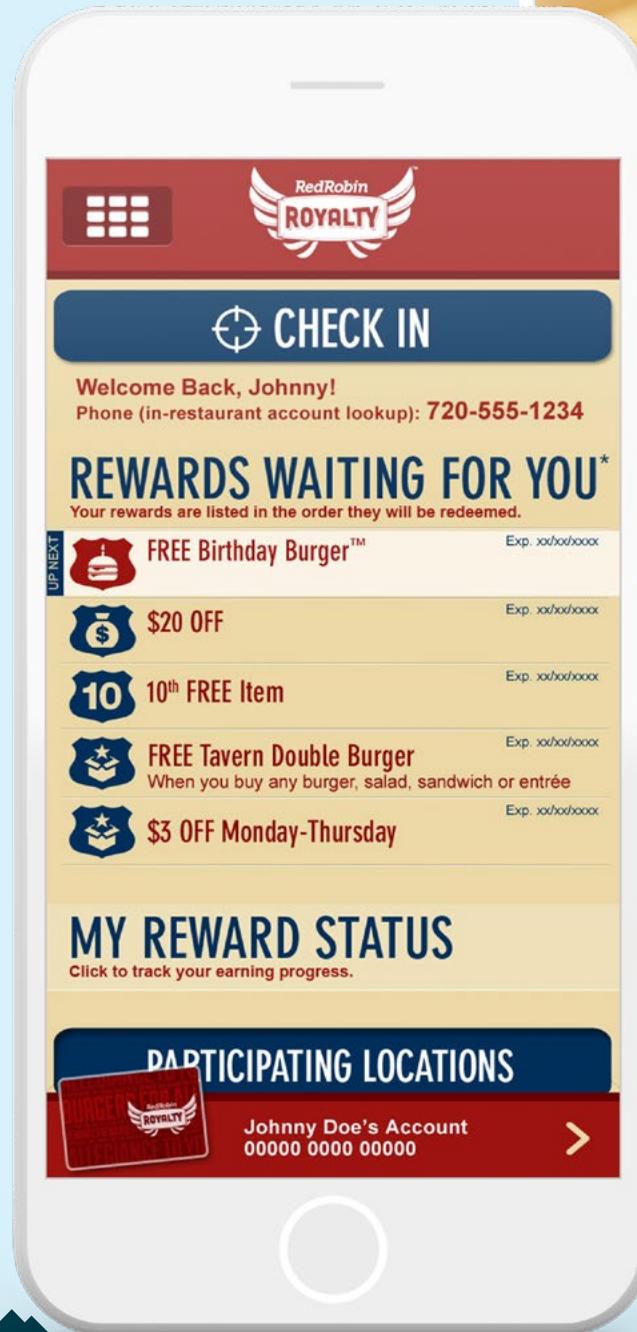


project. Team members already understood and appreciated the cloud approach, so they embraced Heroku almost from the start. They loved the developer experience, how easy it is to deploy apps and scale dynos, and the range of available Heroku add-ons that save them time. They also appreciated the flexibility of the platform, and their confidence in it was demonstrated by choosing to use it for their load test framework – in other words, using the platform to test the platform.



“The Heroku platform provides a stable, scalable solution for our loyalty program’s web and service layers and allows for rapid integration on new features with Salesforce.”

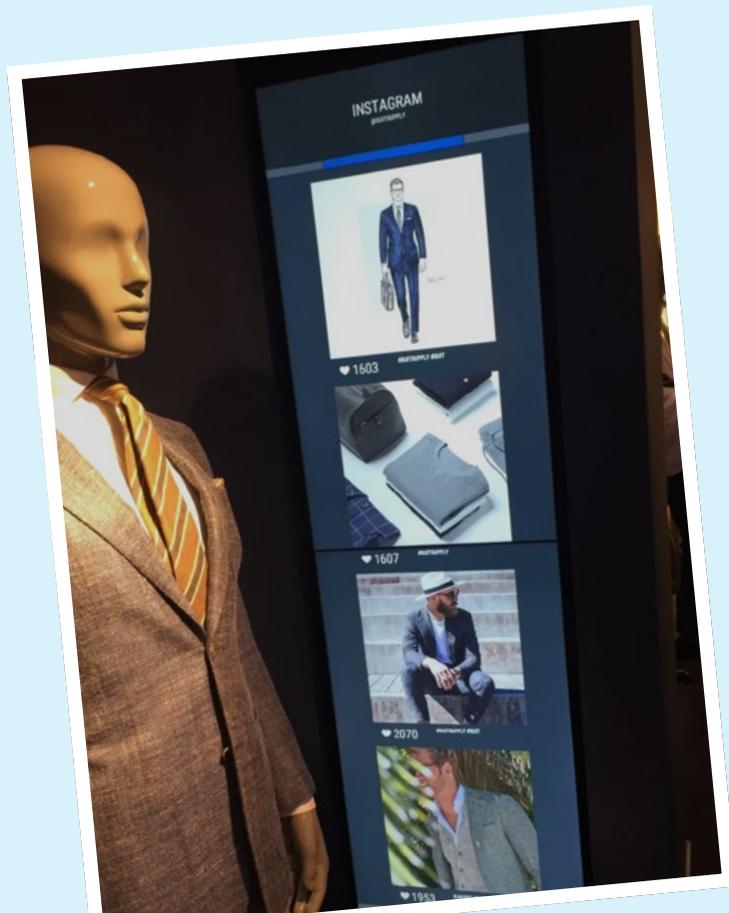
– Ken Mikuska, *Business Solutions Architect*



SUITSUPPLY

FOUNDED 2000 | SIZE 1,250 Employees | LOCATION Amsterdam, Netherlands | WEBSITE suitsupply.com

An in-store app helps a global menswear retailer **deliver seamless service.**



Today's customers expect retailers to know them, remember them when they return, and make the shopping experience easy. Menswear specialist Suitsupply feeds real-time data to its videowalls inside stores worldwide to display social posts and customer feedback – part of the continuous experience it delivers to its customers through Salesforce.

With 73 retail stores in 18 countries, Suitsupply has distinguished itself as a fashion-forward brand that also pushes the envelope on innovative retail technology. The company won the 2015 Golden Omnichannel Award at the 2015 European E-commerce Awards for its “relentless initiative to rethink and reinvent the structure of business by developing from having an in-store format to a high-end omni-channel retailer.” The challenge for Suitsupply is to make the omni-channel reality of

today's retail environment into a seamless customer experience.

“Suitsupply needed a way to connect its customers with the company's sales professional stylists, but found it challenging since our customers use multiple channels to communicate and shop,” said Marketing Director Martijn van der Zee. The company implemented Salesforce Service Cloud to provide its shoppers with highly personalized customer experiences, and then built a customized app on Heroku. Today, in-store screens display the app, which features customers asking personal stylists for fashion advice.

“By leveraging Salesforce,” said van der Zee, “we were able to link multiple mobile and digital channels, enabling our customers to engage with sales professionals on any channel, including Facebook, Twitter, WhatsApp, email, and video chat. We also use Salesforce to gather data from all digital touchpoints to ensure a seamless experience.”

The in-store videowalls mark an evolution in technological thinking at Suitsupply. “We supplied our employees with iPads to help with transactions, but the applications weren't customer-focused,”





said Nick Botter, Manager of Marketing Technology. “So we looked to Salesforce to turn this around – to put the customer in the center, rather than the transaction.”



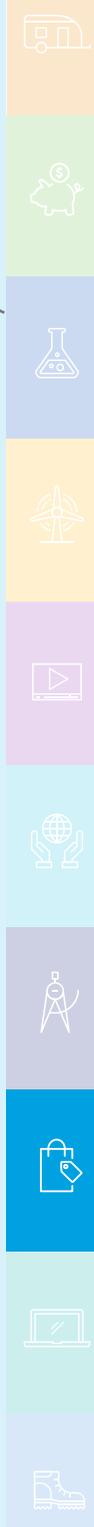
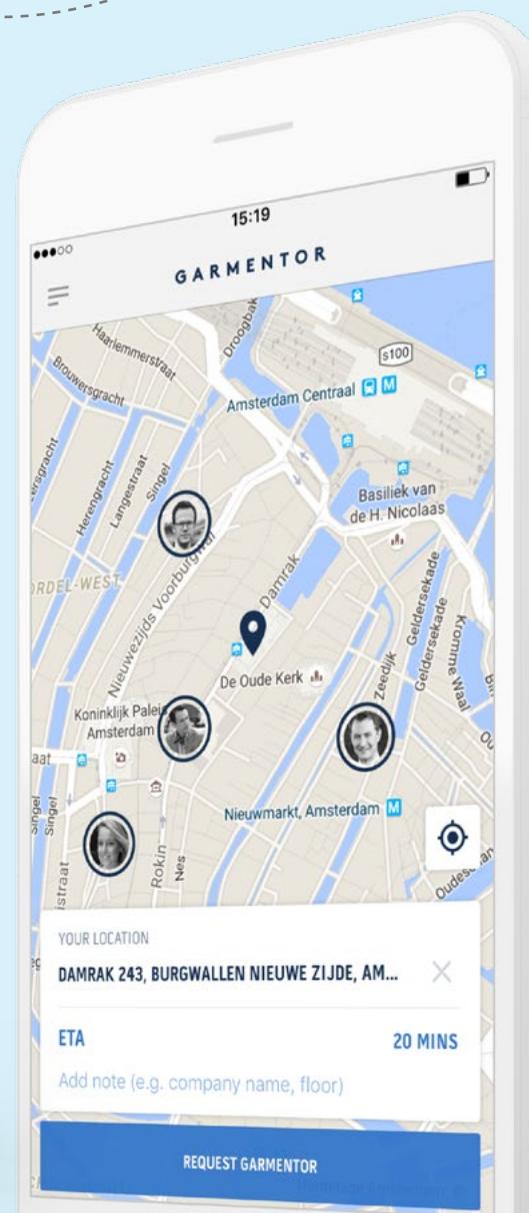
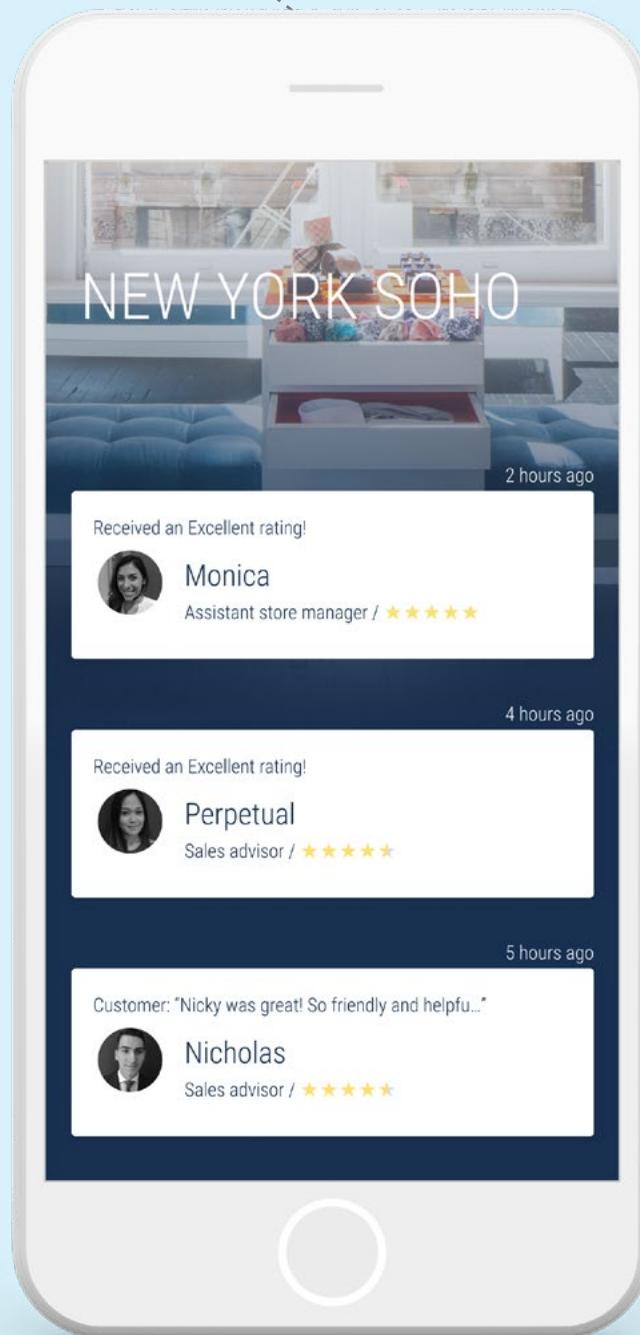
“We started to look at the stores as a digital touchpoint, as well.”

– **Nick Botter**, *Manager of Marketing Technology*

Botter continued, “Normally, when you look at store signage, there is just video playing. We wanted the signs to be interactive and real-time. We built these screens in a couple of weeks on Heroku, connecting with Heroku Connect back into Salesforce.”

“Digital is not a challenge, it’s a radical shift in behavior,” said Botter. “We had our stores, we had our website. But now we are really focused on omni-channel and customer-centric. Salesforce helps us to tie it all together.”

73 stores
18 countries

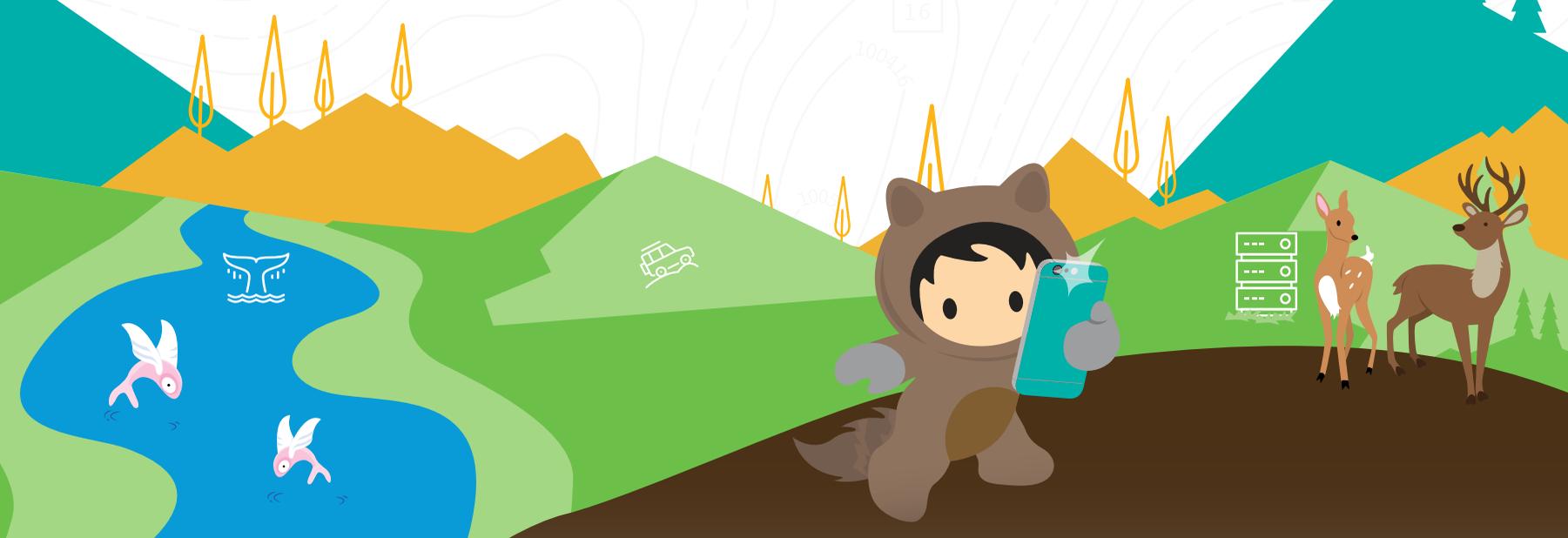




How trailblazers in technology are empowering everyone to innovate

Surging demand for apps across every industry has created a huge backlog – even among the technology leaders who built their businesses on apps. Developers are in high demand everywhere, so recruiting and retaining top talent means offering opportunities to innovate – not endlessly iterate. At the same time, trailblazers are democratizing the app-building process with tools that empower a new class of “citizen developers.” The net result is more apps, built faster – and IT resources freed up to innovate, not iterate.

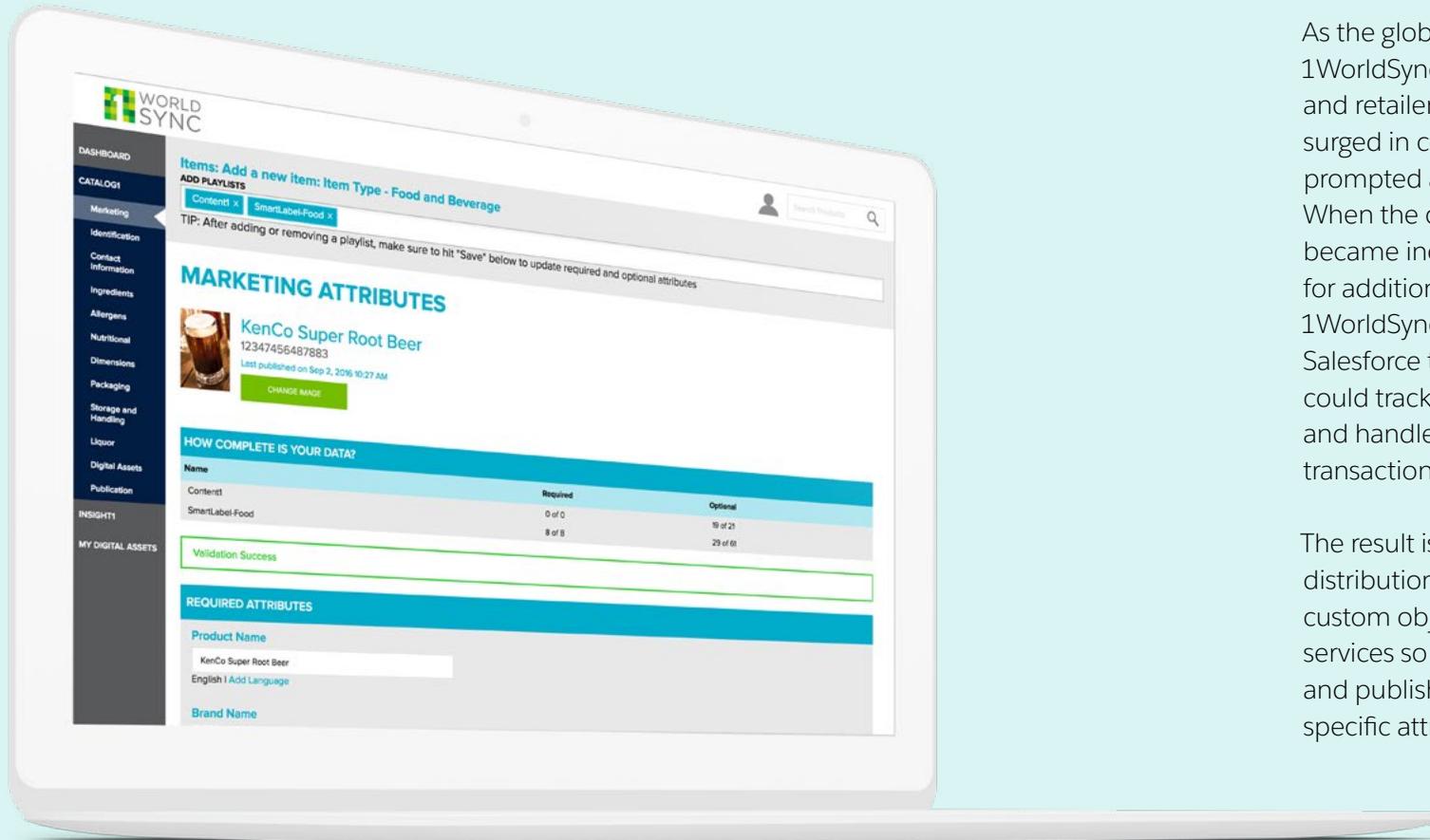
Technology leaders rely on the Salesforce platform because it allows developers to build modern apps in the language of their choice. Developers can and quickly create rich, engaging experiences that are mobile, integrated, and secure. And with its low-code/no-code technology, Salesforce empowers everyone within any organization to build the apps they need to automate processes and boost productivity – all with a modern user interface designed to work on any device.





FOUNDED 2012 | SIZE 200+ Employees | LOCATION Lawrenceville, NJ | WEBSITE 1worldsync.com

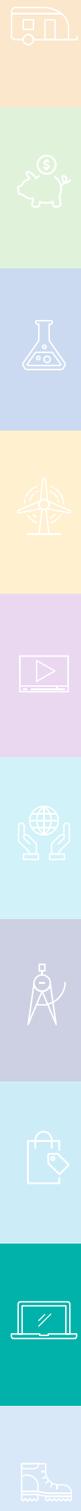
1WorldSync **builds a customer community** while managing the world's product data.



Next time you go grocery shopping, take a second look at the label on a can of beans – or any product on the shelf – and all the product information on that label. Now imagine trying to keep track of all of that information for products around the world. That, in a nutshell, is the kind of problem 1WorldSync deals with every day.

As the global leader in product data management, 1WorldSync serves more than 17,000 suppliers and retailers across 60 countries, a job that has surged in complexity as digital commerce has prompted an explosion in product attributes. When the company's home-grown legacy apps became increasingly strained by the demands for additional levels of trusted product detail, 1WorldSync's product and strategy team turned to Salesforce to help build a multichannel app that could track 13 million global trade item numbers and handle 5 million monthly synchronization transactions.

The result is Catalog1, a powerful content-distribution tool that leverages standard APIs, custom objects, Apex triggers, and workflow services so that product suppliers can validate and publish product item information against specific attribute requirements. By integrating





Catalog1 data with Salesforce Community Cloud, 1WorldSync also provides its customers with a collaborative B2B community platform that supports the sharing of industry news, best practices, and other information. Suppliers subscribed to product playlists in the community can collaborate with each other and receive notifications through Chatter.

“Community is a core part of who we are, and it’s also a big part of our value proposition against our competitors in the marketplace today,” said Ken Sickles, Vice President of Product Strategy. “When you think about the different initiatives that are affecting the entire industry, you can imagine how complicated and time consuming collaboration is between trading partners. With Community Cloud, we can make it much more efficient.”

The Catalog1 metadata drives dynamic item management components in Community Cloud, so customers can see all of their group conversations with the same tool they use to get their work done. “[Community Cloud] became a routine aspect of working,” said Nick Parnaby, Chief Marketing and Strategy Officer. “I think that’s probably what makes it flourish.” A previous attempt by 1WorldSync to build an online customer community (through Yammer)

suffered from low adoption rates because it lacked Community Cloud’s integration with daily workflow. “This platform and these products are critical to the future of 1WorldSync,” said Sickles.

 **“These products are going to help the entire retail industry enable digital commerce for today’s connected consumer.”**

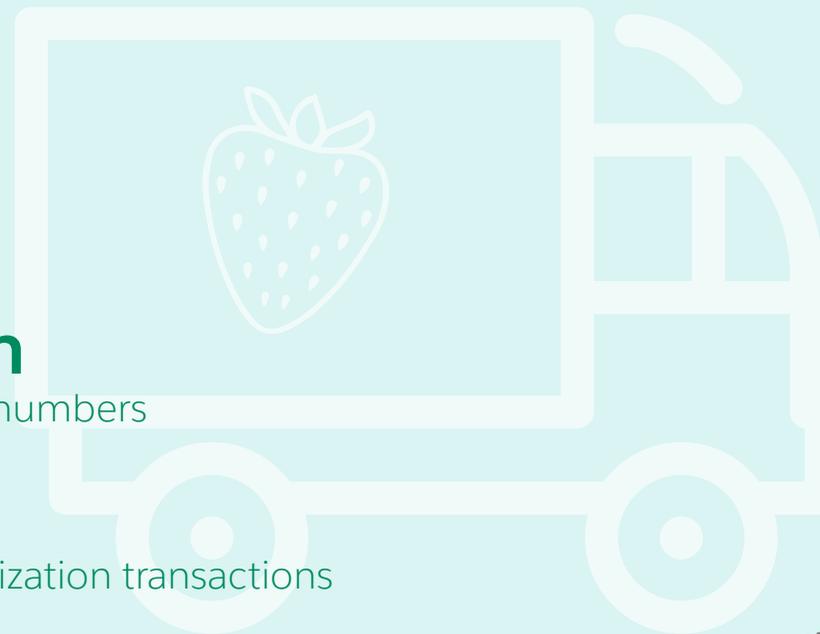
– Ken Sickles, VP, Product Strategy

17,000
customers

60
countries

13 million
global trade item numbers

5 million
monthly synchronization transactions





FOUNDED 2013 | SIZE 150 Employees | LOCATION San Francisco, CA | WEBSITE altschool.com

AltSchool disrupts primary education, one app at a time.



When the founders of AltSchool set out in 2013 to reimagine K-8 education, they asked themselves how they could prepare children for life in the year 2030. With over 400 students in eight schools on two coasts, AltSchool relies on Salesforce to support its unique educational model – a personalized curated curriculum for every child.

As both a tech startup and a school, AltSchool needed a technology platform to support all its operations, from the admissions funnel front end to the personalization and communication tools required for teachers, students, and parents. After considering alternatives, AltSchool chose the Heroku platform as an exceptionally streamlined, fast, and cost-effective solution.

“The entire team was excited about the opportunities that Heroku gave us,” said Bharat Mediratta, Co-Founder and CTO.



“The platform makes it easy to create and deploy a new app. Once we started using Heroku, we never looked back.”

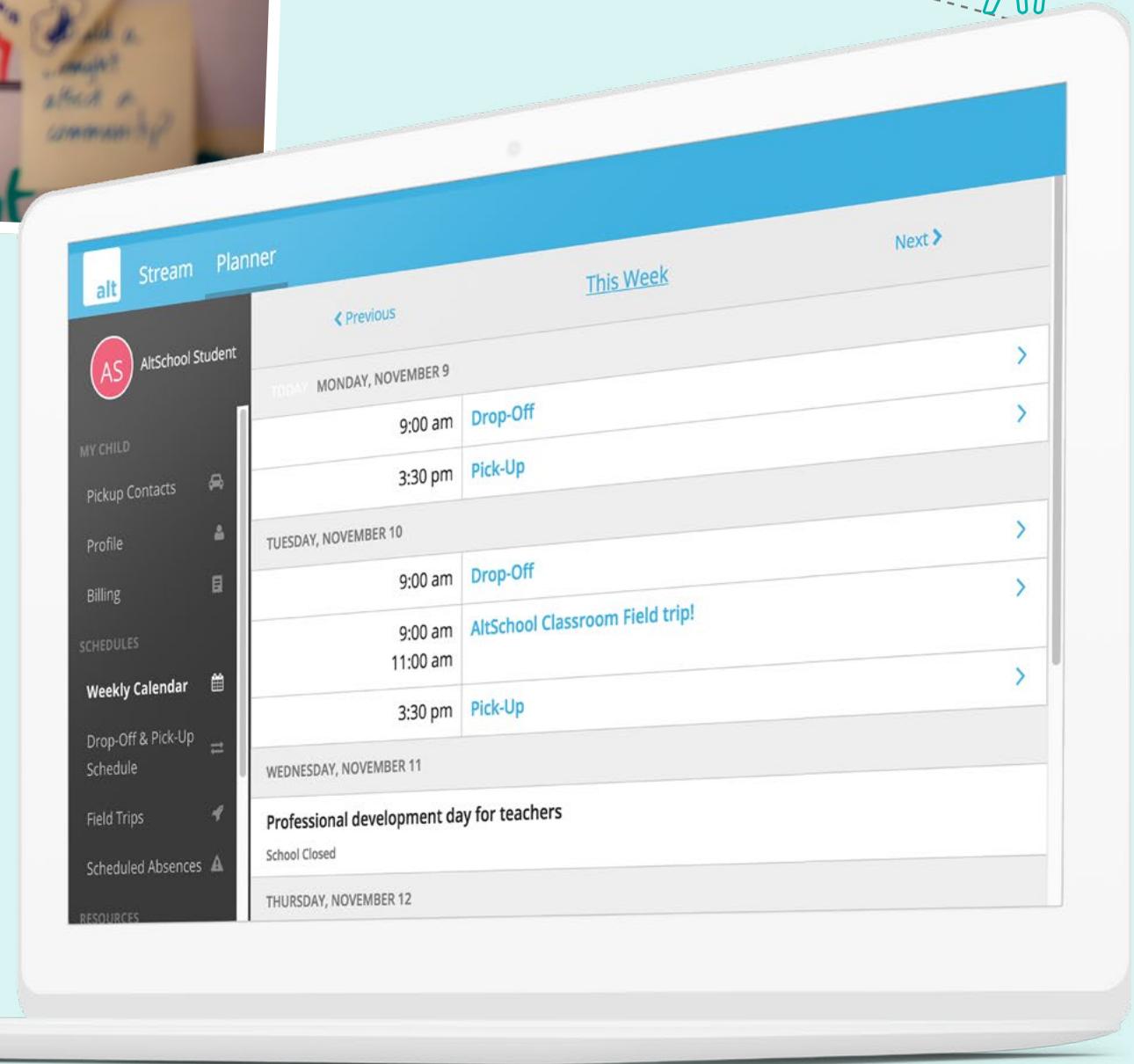
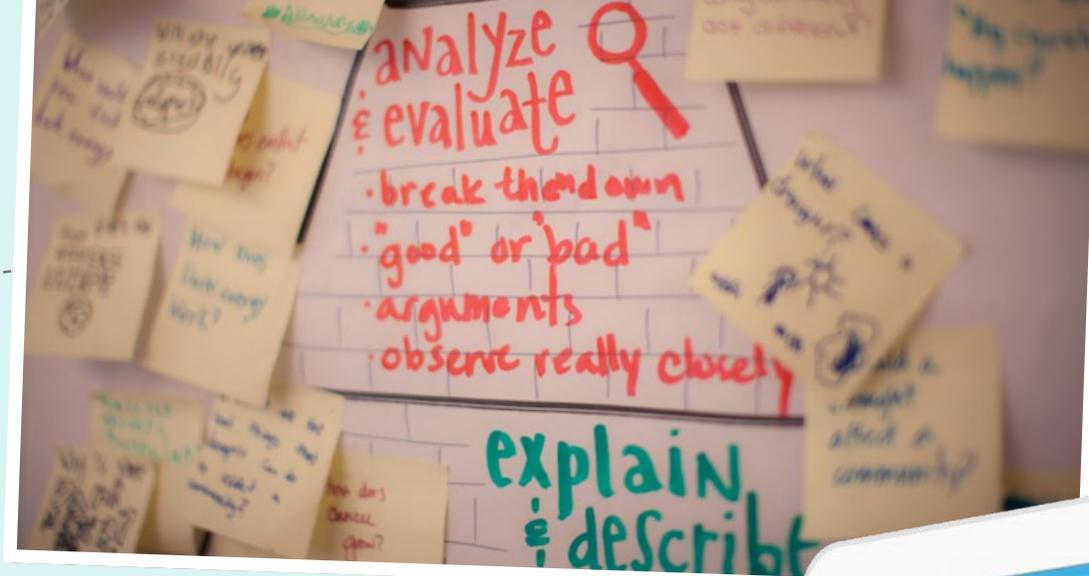
– **Bharat Mediratta**, Co-Founder and CTO

The development team began by building a demo on Heroku. Team members were pleasantly surprised by how quickly they got it running, and now the entire stack, including 14 apps, runs on Heroku.

A beautiful, sophisticated web app introduces parents to AltSchool – its mission, its team, and its eight locations in the San Francisco Bay Area, New York City, and soon, Chicago. The site then takes visitors on a deep dive into AltSchool’s educational approach and learning tools. Parents interested in submitting their child’s application go through a streamlined process on the parent portal.

Children at AltSchool manage their work through a customized Playlist app, while teachers track their students’ progress in math, language arts, and social emotional development through a Progression app. Parents of enrolled students have a parent mobile app so they can see regular updates about their children’s schoolwork and classroom experiences. The app also gives parents access to school resources, announcements, and calendars, and enables them to communicate with faculty and staff.





“What’s great about Heroku is that all the heavy lifting happens behind the scenes,” said Mediratta. “Heroku’s conceptual simplicity and ease of use greatly reduces friction in our development process and allows our team to be much more productive.”

14
apps

425
students

8
schools





FOUNDED 2011 | SIZE 75 Employees | LOCATION Chicago, IL | WEBSITE bellycard.com

Wallets everywhere celebrate the end of the paper loyalty punch card.



Shoppers who are sick of fumbling for crumpled loyalty cards in their purses and wallets have found a friend in Belly. The Chicago-based company offers its 7 million users a digitized customer loyalty program that's fun and convenient to use at more than 12,000 merchant locations nationwide. Salesforce has powered Belly's unique customer experience since 2015.

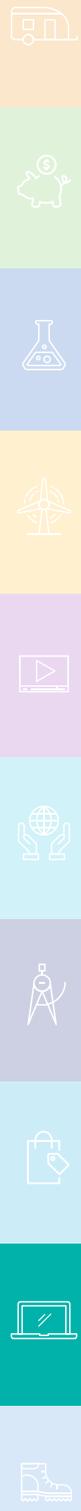
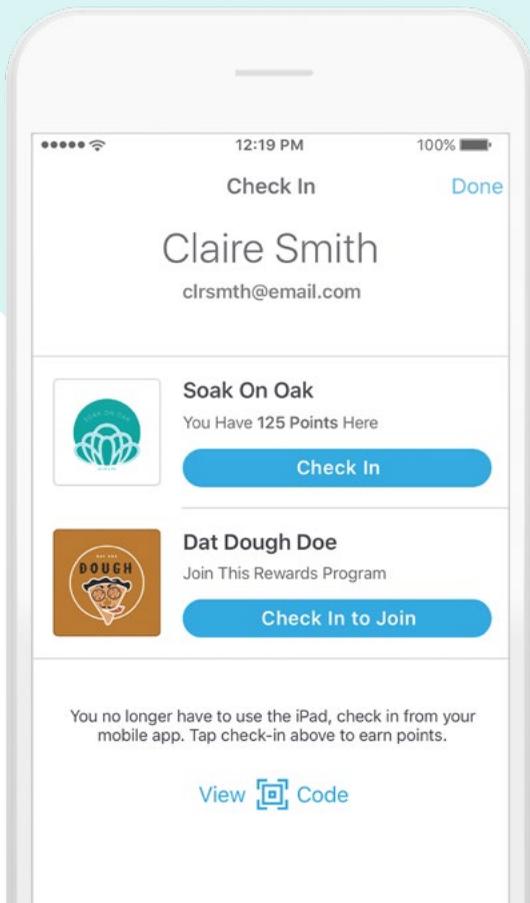
The Belly mobile app provides shoppers with discounts and loyalty points while Belly-affiliated merchants in turn offer loyalty discounts to their regular patrons and gain exposure to new customers. To manage and scale this effort, Belly's founding team launched its original platform in 2011 as one monolithic app built with Ruby on Rails. Later it pivoted to a microservices architecture on AWS (Amazon Web Services), but that approach took significant resources to maintain. In 2015, the team migrated the platform to Salesforce, mapping a six-week time frame to avoid disrupting its traffic.

Immediately, the number of DevOps engineers required to maintain infrastructure dropped from three to zero.

 **“After migrating our app from AWS to Heroku, we're able to move faster, release faster, and spend less time as a team managing infrastructure.”**

– Darby Frey, VP of Engineering

The Belly engineering team uses the Salesforce API to funnel data captured from the loyalty platform into Salesforce. This allows the account team members to gain further insight into loyalty program performance so they can better support their merchant customers. Belly's sales and account teams use Sales Cloud and Service Cloud to manage merchant relationships and sync with their Zuora billing system.



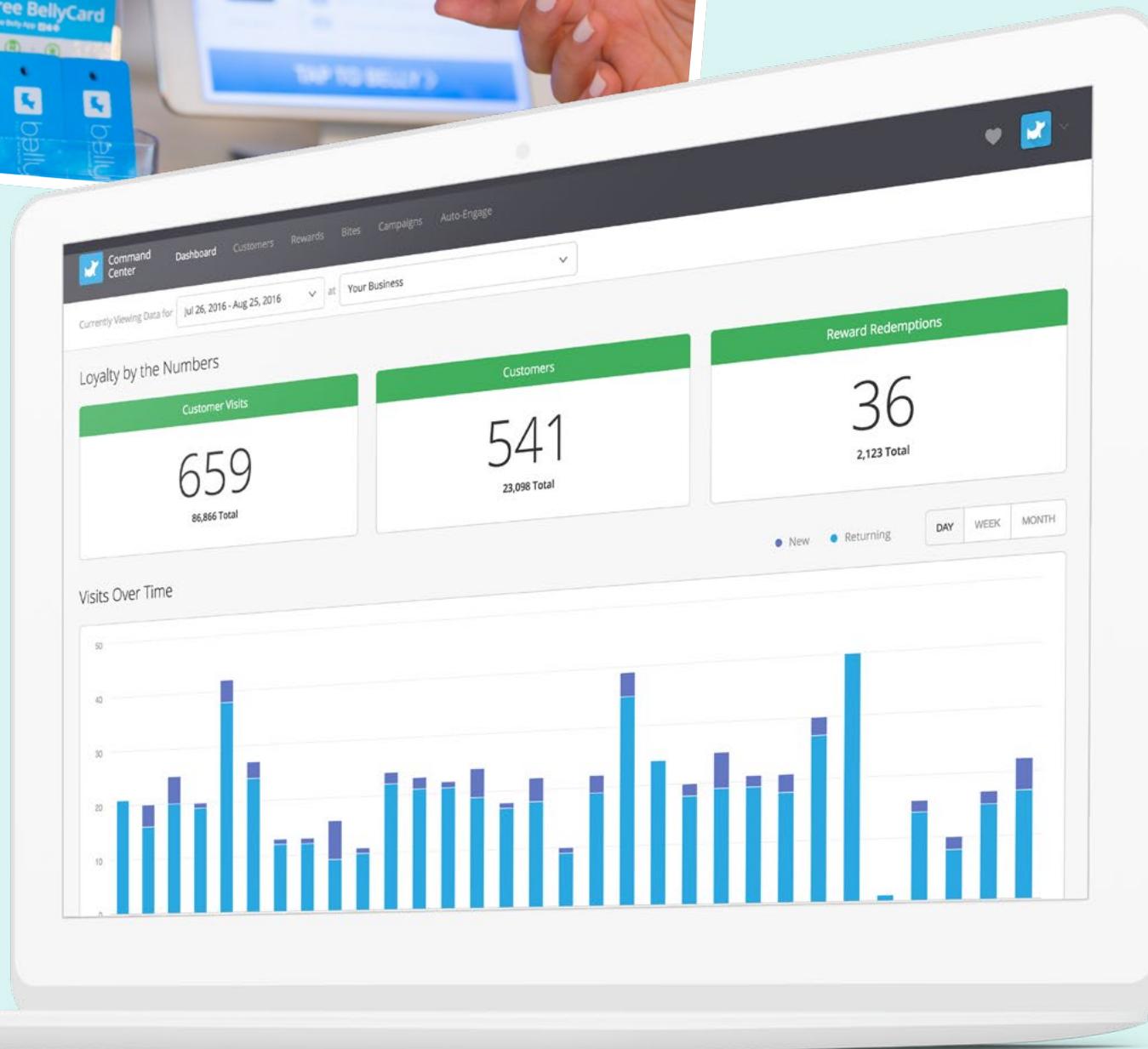


The Heroku platform is so well suited to a microservices approach that the Belly team has been able to break out components of the Belly app into separate services, with over 50 apps currently running on Heroku. By leveraging a range of Heroku add-ons, the team can extend the apps with additional services in just a few clicks. “Heroku add-ons are so easy to integrate and use,” said Frey. “They’ve really saved us the time and effort it would take to build or host those services ourselves.”

—
7 million
 users

8,500
 merchants

**Zero DevOps
 Engineers**
 required to maintain
 infrastructure with Heroku





FOUNDED 1983 | SIZE 7,700+ Employees | LOCATION Mountain View, CA | WEBSITE intuit.com

An outsider was just the **trailblazer Intuit needed** to forge ahead.

Intuit's mission is "to improve customers' financial lives so profoundly, they can't imagine going back to the old way." In fact, Scott Cook co-founded Intuit in 1983 after watching his wife try to balance their checkbook and thinking, "There has to be a better way." More than three decades later, the company's flagship products – QuickBooks, TurboTax, and Intuit's latest personal finances solution, Mint – offer everyday people a better way to manage their personal and small business finances. Today, with annual revenue in excess of \$4 billion, Intuit has touched the lives of 50 million people worldwide.

Intuit's strategy as a company is twofold: to be the operating system behind small business success and to do everyone's taxes in the U.S. and Canada. "Our goal is to empower people around the world to simplify the business of their lives," said Atticus Tysen, Senior Vice President and Chief Information Officer.

But even as the company was earning rave reviews for its outstanding service and products, its leaders discovered that they needed to work harder to keep employees satisfied and empower them to do more – a critical component of keeping customers happy.




“It’s hard running all of the existing systems while you’re trying to build out the future.”

– Atticus Tysen, CIO





It was a job that fell to Tysen, who had worked at Intuit for more than 14 years in a variety of management roles – IP protection, product management, engineering and operations, and enterprise business solutions – when he became Intuit’s CIO.

While Tysen didn’t have the typical resume for the new role, he did bring one important perspective to the job: he’d been an internal customer of IT and not always a happy one.

Having an issue with IT is one thing, trying to “fix IT” is another. Tysen, who had a wide variety of experiences with IT through his past roles, knew he wanted to improve the way IT worked for the company on day-to-day issues. But he soon discovered that it was no simple task when you’re also trying to set a new course that will help the company move forward for the long term.

“It’s hard running all of the existing systems while you’re trying to build out the future,” said Tysen. “We have many different layers of technology. IT has to operate all of them well because they’re serving customers and different segments of our customers. If any one of those systems is not performing, then we’re not performing. It’s hard to appreciate that on a day-to-day basis until you really get in and understand it from the inside.”



Changing for tomorrow while keeping pace with customers today

Intuit is on a change journey – from on-premise, legacy systems to SaaS (software as a service). “A lot of the impediments to that journey lay in the constraints of Intuit’s legacy IT,” said Tysen. “We had nine different billing systems and five different CRM systems.” Based on conversations with other CIOs, he began to see this as a pattern of IT operations elsewhere: The business had built solutions from a tactical point of view rather than a larger strategic plan.

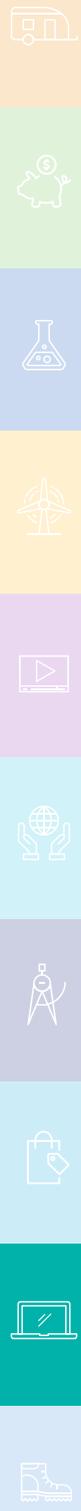
Tysen quickly decided that one of his major goals would be to simply avoid repeating that outcome. “As we move into a SaaS world, I want all our technology to come from best-of-breed vendors who can push us in how we think about our business,” he said. “We need to think about where the company’s going, and then build our architecture to meet those needs. There isn’t one answer for every company. It’s a very specific answer for each.”

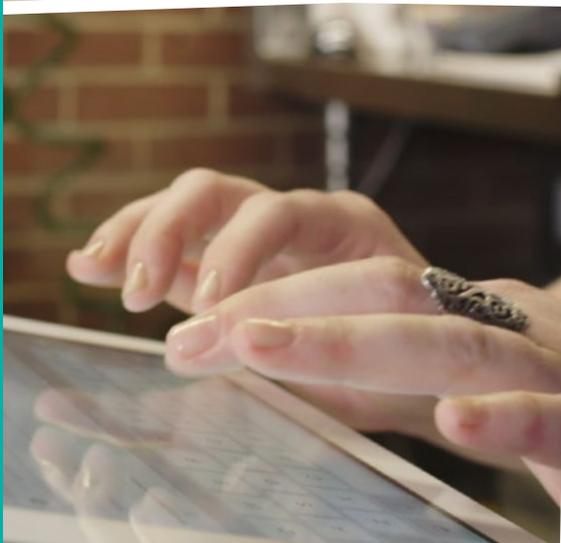
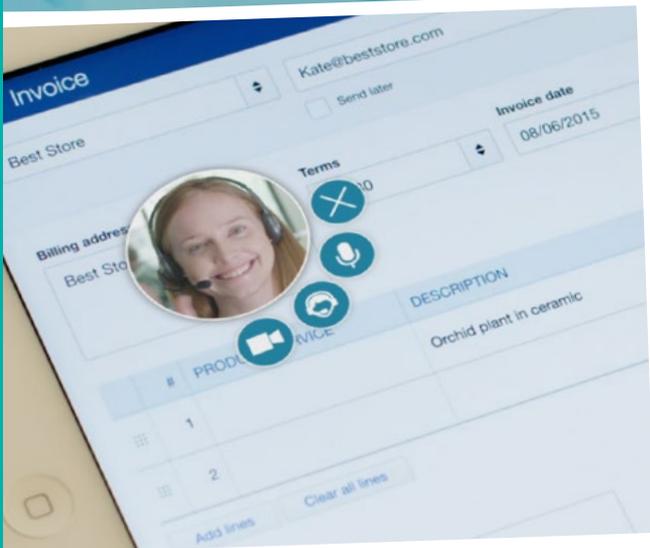
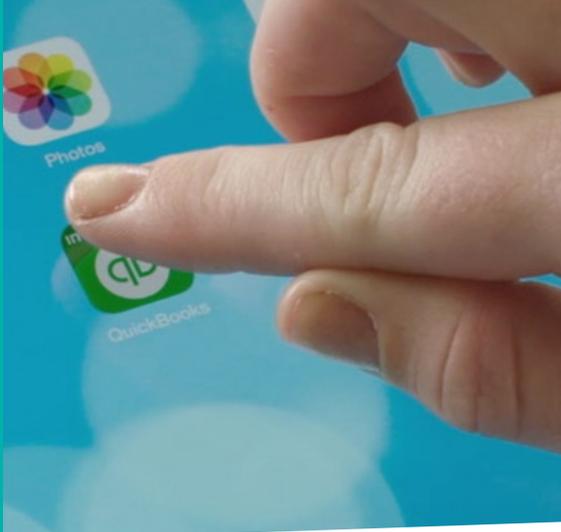
Like a lot of companies, Intuit leaders knew the company needed a better onboarding process. It’s critically important for managers to onboard a new employee efficiently and provide a positive experience. But ensuring that the appropriate onboarding materials were sent to new hires was

challenging for Intuit managers. They had to go to at least three different systems to request assets for a new employee, and would often miss one or two necessary steps.

For new employees, this could be a bumpy introduction. They would have to visit a few different places to sign documents, enroll in benefits, and begin their specific job onboarding – all while learning about the company. New hires received many competing emails from various people, teams, and departments. It added up to an ad hoc, manual process out of step with what talented new hires expected from a leading Silicon Valley employer. What’s more, employee frustration with existing systems came through loud and clear in annual surveys.

Tysen realized that Intuit needed to do something to simplify employees’ lives, so he set out to explore the available options. The company needed a secure platform that could scale for growth and evolve as business demanded. As a software organization, Intuit had a lot of platforms and development experiences, so it would be possible to build the platform internally. But this option would prove costly by pulling developers away from their current product focuses.





THE SOLUTION

A platform that can connect it all today – **and scale for future growth.**

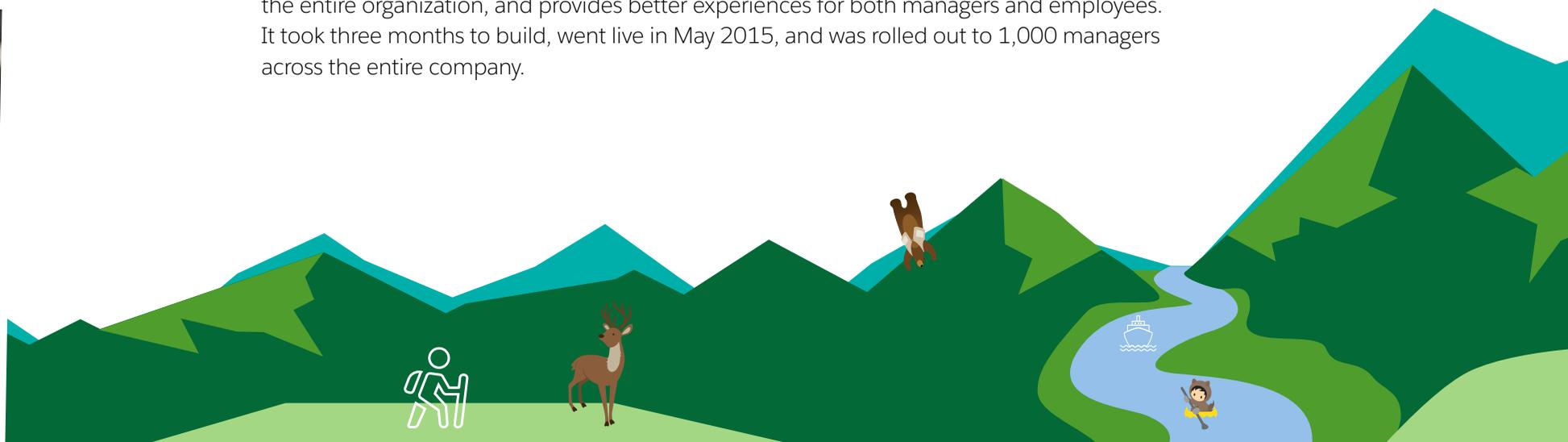
After deciding not to build the solution in-house, Intuit's leadership looked at existing platforms for B2B and B2C organizations. One of those platforms was Salesforce, which was already used by Intuit's customer support and sales organizations.

Intuit overhauled the new hire experience by building an employee portal using Force.com from Salesforce. This portal guides newcomers through step-by-step instructions, all in one place. Behind the scenes, the app uses custom APIs to connect with all the right HR systems and provide the necessary content access, new hire forms, timekeeping tools, and more.



“The Salesforce platform provides a seamless environment for service and sales, and gives our agents the tools to access information that best serves our customers,” said Tysen. “Based on that, we believed it could bring the same benefits to our employees and HR partners.”

The company also built a manager portal on Force.com with custom Visualforce pages. By digitizing and standardizing the manager onboarding process, Intuit saves time across the entire organization, and provides better experiences for both managers and employees. It took three months to build, went live in May 2015, and was rolled out to 1,000 managers across the entire company.

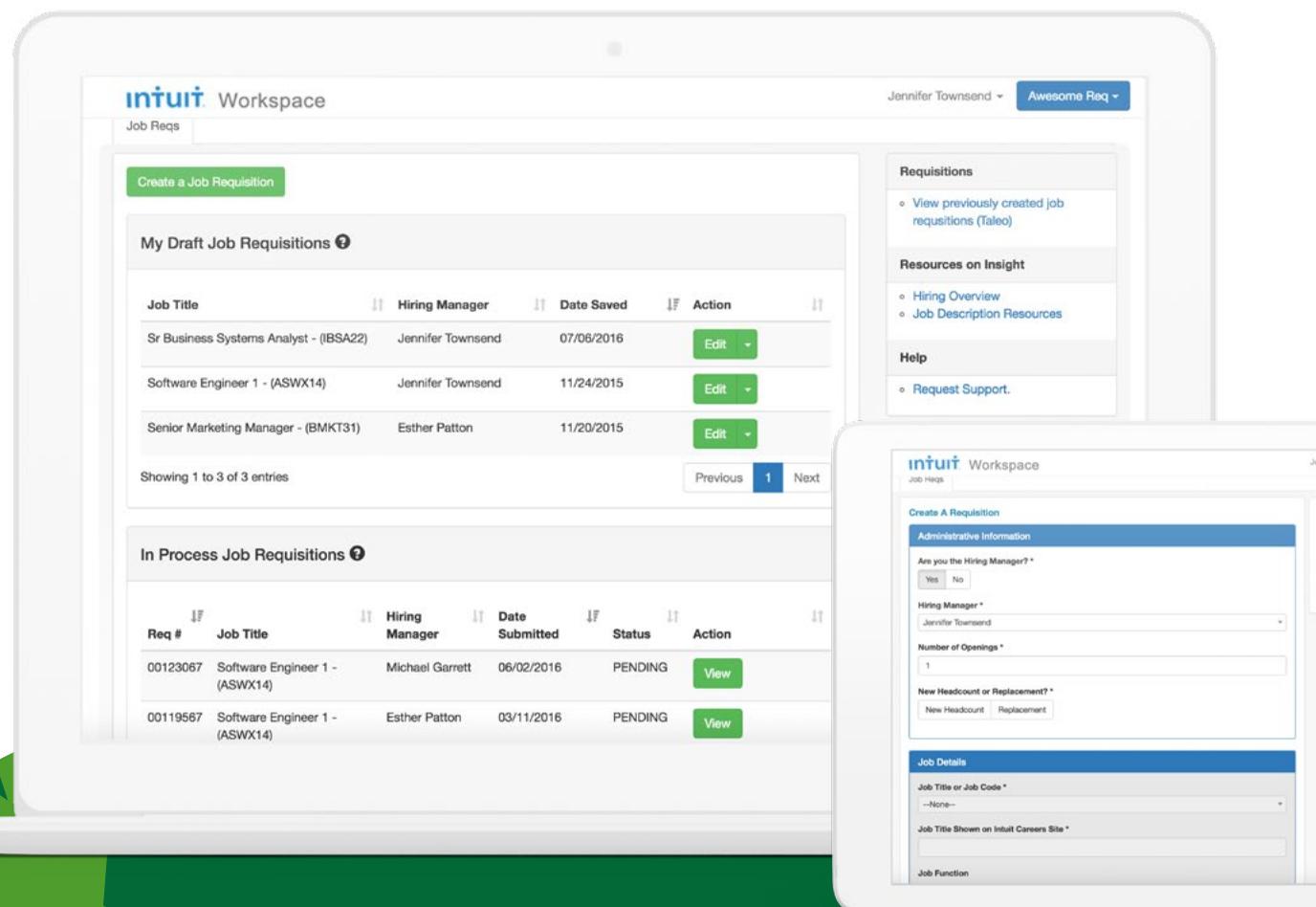




Intuit's workforce is one of its most valuable assets, so one of the biggest measures of success was employee satisfaction. The company also grades every application by its Net Promoter Score (NPS). Before these apps were built, the onboarding experience was in negative NPS territory – now, it's in the 80+ range. Managers are pleased with the experience, and new hires are onboarded faster, with fewer headaches.

“One of the things that feels great about being in IT at Intuit right now is we're on our own mission to really improve the lives of Intuit employees,” said Tysen. “By consolidating our systems, we can focus our resources and attention on creating an even better customer experience.”

Now, instead of many solutions, Intuit has one solution that works for everyone. It gives Tysen a set of tools he can customize for various departments, and it offers security that Intuit already trusts, so the company didn't have to vet yet another solution. And because it's built on a platform Intuit is already using, Tysen and his team were able to get it up and running quickly, without draining precious resources from other projects. For Intuit and its forward-looking CIO, Salesforce is what the future looks like.





FOUNDED 1979 | SIZE 45,000 Employees | LOCATION Cupertino, CA | WEBSITE seagate.com

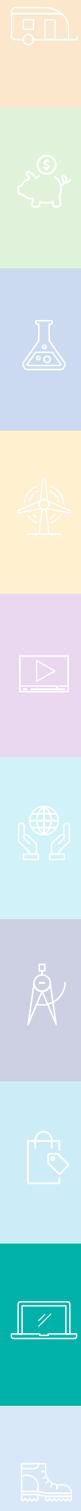
A facilities maintenance app **helps manage global operations.**

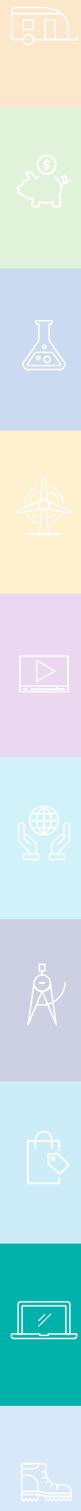
Managing and tracking far-flung work facilities is a problem for most multinational companies, but Seagate is one global player that has developed a handy solution with Salesforce. The iconic maker of data storage solutions depends on a simple and effective app for facilities maintenance requests at work locations for the company's 45,000 employees around the world.

The cloud-based app, which manages maintenance requests through standard forms with Visualforce, pulls data faster and requires fewer clicks than the previous solution. Users also prefer the dashboard which offers more information at a glance. "We do metrics so we can see how easily the site was configured and how easily requests are submitted into the system," said Samuel Abraham, Senior Manager of Business Application. "We are now more efficient. It's saved us a lot of time."

Seagate has used the Salesforce Platform since 2003 and uses App Cloud to innovate across all seven lines of its business, with more than 40 apps that include a mobile timecard app, a global health-and-safety assessment tool, and a security forms and services app. "The first custom apps we've built were actually CRM extensions with sales and marketing," said Mark Brewer, Senior Vice President and CIO. "In fact, some of the front-end app development tasks were even prototyped by business analysts."

One major benefit for Seagate is that all the apps rely on common data. "We were able to seamlessly integrate all of our back-office data from Oracle ERP," said Brewer. "This allows for consistency and accuracy across the board."





“When the data gets updated in one location, it gets updated everywhere.”

– Samuel Abraham, Senior Manager of Business Applications





FOUNDED 2013 | SIZE 1,000 Employees | LOCATION San Francisco, CA | WEBSITE zenefits.com

Zenefits delivers automated licensing compliance at scale.

Turning a weakness into a strength is something that doesn't happen every day. But that's what happened at Zenefits, a leading all-in-one HR provider for small businesses that has made its app for insurance licensing controls available at no cost on Salesforce AppExchange. Available now, the app can be leveraged not just by the insurance industry, but any industry that requires licensed professionals.

 **“We want other companies and industries to benefit from the technology we’ve built to solve our own licensing challenges.”**

– David Sacks, CEO

The Licensing+ by Zenefits app was designed to ensure that every sales representative is properly

licensed to sell insurance in the state where a current or prospective client resides. “With more than 10,000 licenses, we process thousands of verifications every month,” said Joshua Stein, Chief Compliance Officer. “Automating the licensing controls has streamlined that to ensure greater accuracy and save a tremendous amount of time.”

Upon discovering some opportunities were being assigned to sales reps not licensed in the same state as the customer, Zenefits' IT and legal teams were asked to identify an automated solution for verifying licensing across the company's 250-plus insurance brokers and advisors. Using the Salesforce Platform made sense because Zenefits employees were already on Salesforce. “Using an internal development team, we moved from concept to deployment across the sales and advisor teams, bringing our licensing fully into compliance the day we rolled it out,” said Niji Sabharwal, Director of Producer Licensing and Broker Compliance.

Taking it a step further, Zenefits added a feed from the National Insurance Producer Registry (NIPR) to ensure licensing information is always





up to date. “Insurance licensing rules serve as an important consumer protection,” said Michael Lujan of the California Association of Health Underwriters. “Using a platform like Salesforce to help validate licensing for system transactions makes sense for agencies that have similar challenges tracking their large staff licensing and compliance.”

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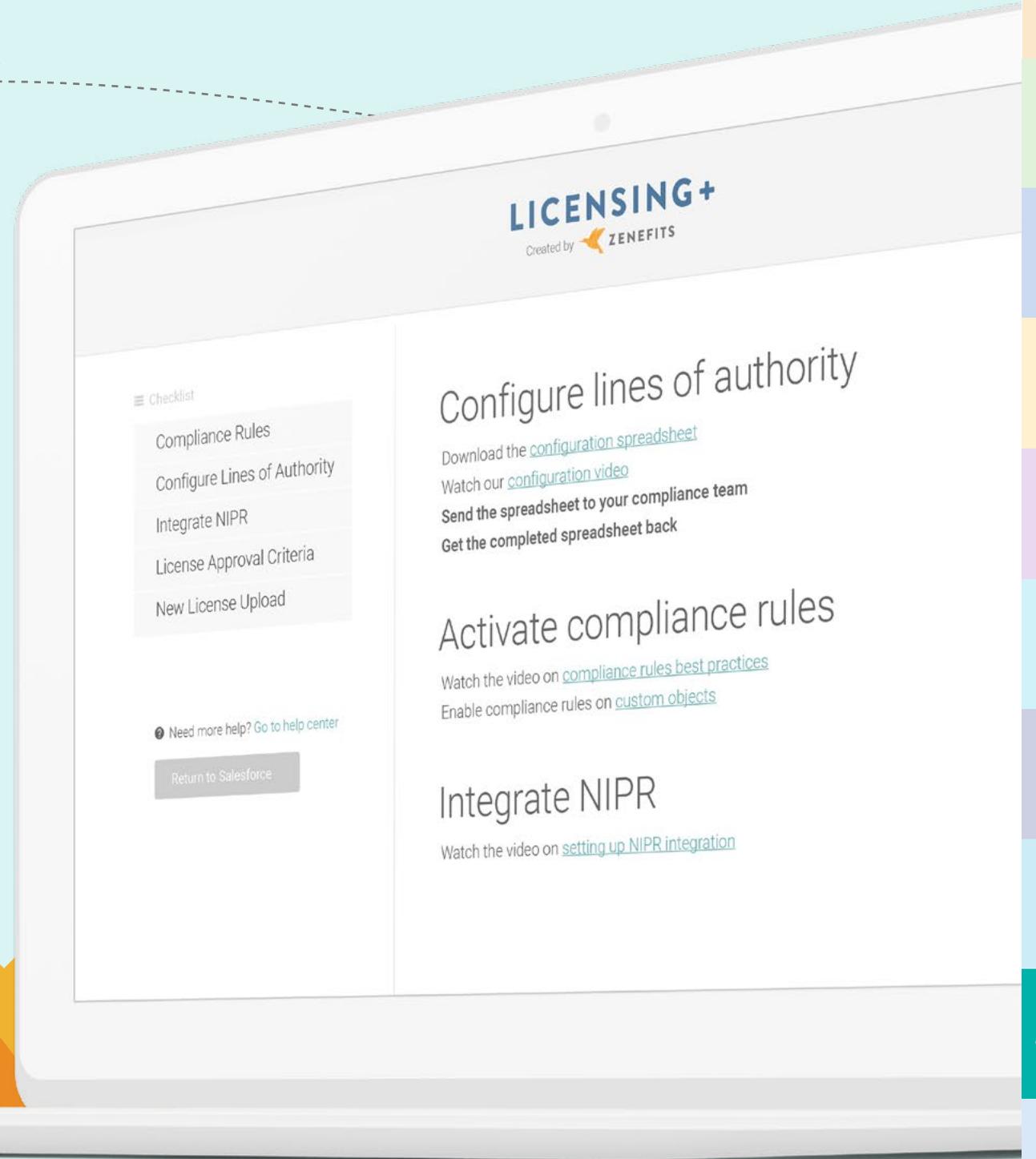
insurance brokers
and advisors

10,000

insurance licenses
managed

Zero

cost for other brokers
to use the app





So what makes a trailblazer?

As the organizations featured in these pages make clear, it's all about discovering a whole new way to connect with customers. Trailblazers are building the apps that make this possible.

The good news is you don't have to radically reinvent yourself to become a trailblazer. All you need is the right platform on which to build your vision.

You've already taken your first step by reading this book. Where you go now is up to you. As you've discovered, there is no limit to what you can do with Salesforce. Now you can empower anyone to build productivity apps and run your entire business on a single platform. Join the thousands of trailblazers who are changing their business, their role, and connecting to customers in a whole new way.





1 | See everything Salesforce offers for IT. From the world's #1 enterprise app building platform to lightning-fast ways to optimize and customize your CRM, we have solutions designed to turn any IT leader into a trailblazer. Learn more at salesforce.com/platform

2 | See how easy it is to blaze your own trail. We'll guide you step-by-step at trailhead.salesforce.com now!



The Salesforce Advantage

Salesforce has always been an innovator. Seventeen years ago, we pioneered a new technology model with our cloud platform. We were born in the cloud and we are 100% cloud today. But our real success is driven by our customers' success. Over 100,000 companies worldwide trust our secure architecture and 99.9% uptime – and rely on three seamless, automatic upgrades each year to keep their business growing. By removing the burden of maintaining costly legacy infrastructure, our customers are free to focus on innovation.

The Salesforce platform is a complete CRM solution that connects every facet of your business so you can connect with your customers in a whole new way. There is simply no better platform for building apps – from low code/no code to elaborately customized apps – or a larger ecosystem of readymade apps, available on our AppExchange. No matter how big – or small – your company, whatever your industry or current systems, Salesforce is the right partner to help you become the IT leader you need to become to lead your business into the future.



The Benefits of Salesforce

Lightning Platform – Now anybody can create rich, engaging apps that deliver a beautiful user experience on any screen. The Lightning Platform is the fastest way to build connected, scalable, secure apps that connect you to your customers in new ways.

Artificial Intelligence – More intelligent. More predictive. Salesforce Wave Analytics and our new Einstein – the world's first comprehensive AI for CRM – transform all the data from your customers, suppliers, and the Internet of Things into insights and actions that will drive sales, product enhancements, and customer satisfaction.

Mobility – The mobile revolution could not have happened without the cloud revolution. Everything we do is mobile-ready – and with the Salesforce Platform, now you have everything you need to build, run, and manage engaging mobile apps that are secure from day one.

Productivity – Automate processes, give your employees a 360° view of your customers from any device, connect your field staff to HQ – the Salesforce Platform replaces infrastructure with constant innovation so you can increase productivity in every department, every employee, across the business.

Find out more at salesforce.com/platform

Or call now to speak with one of our experts: **1-844-463-0828**





salesforce

CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY



