

HOW TO GET
A RAPID START
WITH AI TO
#SELLBETTER?

Columbia Road





Hello!

Columbia Road is all about helping companies sell better. Our mission is to turn complex problems into seamless commercial solutions.

If there's one thing that can help us fulfil that mission, it's AI. AI poses immense opportunities for companies to sell better. In this booklet, you'll find how AI can be leveraged across the customer journey – powered by Salesforce.

Reach out to us if you'd want to dive deeper and discuss more.

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BUILDING BLOCKS OF FUTURE-PROOF DIGITAL COMMERCE

Data & AI-powered growth

Ownership of digital sales in
data-driven cross-functional
growth teams



Composable commerce

Differentiate with
best-of-breed interchangeable
components



BUSINESS OPERATIONS

ENABLING CAPABILITIES

HOW CAN AI BE USED ALONG THE CUSTOMER JOURNEY?

Utilising AI to identify and predict the stages of customer journey

Marketing / Sales objectives	PRE-PURCHASE <ul style="list-style-type: none"> Increasing awareness Nurturing consumers Increasing consideration 	PURCHASE <ul style="list-style-type: none"> Increasing website traffic Getting conversions Targeting right content and promotions 	POST-PURCHASE <ul style="list-style-type: none"> Lifting the customer experience Enhancing post-purchase engagement Increasing loyalty
AI applications within the stages	<ul style="list-style-type: none"> Meaningful customer insights and segmentation Advertising optimisation Content & SEO optimisation 1-1 personalisation 	<ul style="list-style-type: none"> Website optimisation Personalised content and offers in real-time Price elasticity analysis and targeted promotions 	<ul style="list-style-type: none"> Better personalised CX Predicting future needs Predicting customer value Predicting customer churn

Salesforce AI applications throughout the journey



Customer service with chatbots and NLP

- Engagement scoring & splits
- Messaging insights
- Engagement frequency
- Content selection & tagging
- Email & web recommendations
- Einstein Attribution

Marketing & Sales analytics with intelligent algorithms

- Lead scoring
- Opportunity scoring & insights
- Sales Forecasting
- Account insights
- Recommended connections
- Activity capture & Email insights

Customer care, product development with prediction and insights

- Einstein Bots (SMS, Chat, Slack, FB Messenger etc.)
- Case classification, wrap-up & routing
- Article recommendations
- Reply recommendations (Chat)
- Service analytics

STEPS TO EXPLORE AND IMPLEMENT AI TO DIGITAL SALES

4 week digital sales AI sprint

WEEK 1

Explore current setup

– interviews:

- Data quality
- Digital channels, platforms and tools
- Data integration architecture
- Team skills

WEEK 2

Opportunities for AI:

- Current data for AI
- AI Tools to experiment
- Experimentation team structure

WEEK 3

AI opportunities to sell better – WORKSHOP:

- Customer journeys
- Map and gather ideas: AI business opportunities from customer journey
- Ideas to prioritised backlog for development

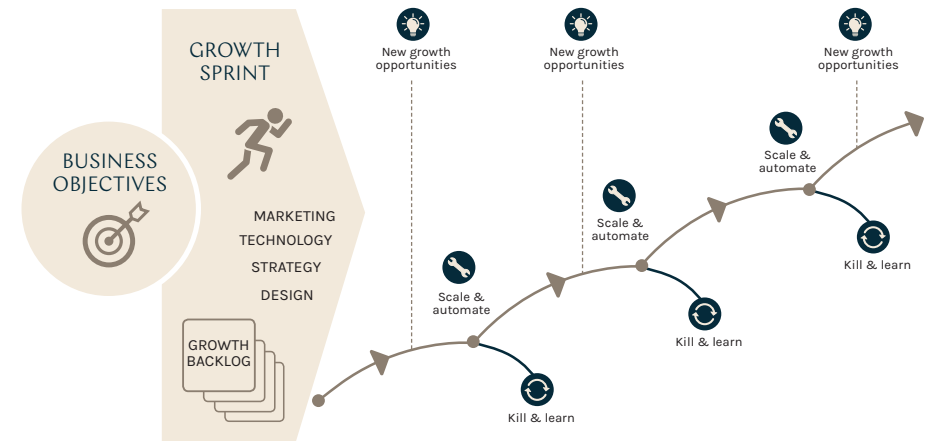
WEEK 4

AI business cases validation and prioritisation:

Defined AI business cases:

- Measurement of success
- MVP experimentation definition for end users/customers

Continuous growth



With cross-functional AI experimentation team

One shared backlog for ideas and development



AI expert



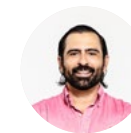
Full-stack developer



Designer



Growth hacker



Salesforce architect

Title	KPI	How to measure	Impact	Effort
Email & web recommendations	Click rate	CRM dashboard	5	1
Conversation insights	SQLs	MA dashboard	4	3
Einstein Bots	Deal win rate	CRM dashboard	5	2

PERSONALISATION OPPORTUNITY CANVAS

This canvas helps you identify opportunities to provide personalised experiences across the customer journey.

START FROM THE MOST IMPORTANT, YOUR CUSTOMER

Customer opportunity / Problem need ideation

Write as many ideas as possible about what needs your customers might have regarding making them feel special by offering personalized experiences. Quantity over quality. Here are some suggestions.

- Can you help me find what I like?
- Can you show me deals I actually want?
- Can you surprise me in a good way?
- Can you remember my preferences?
- Can you make me feel special?



TOP 3 CUSTOMER NEEDS

WHAT DATA IS NEEDED?
WHERE IS THAT DATA LOCATED?

WHAT ARE THE CHANNELS
WHERE THE PERSONALISATION
TAKES PLACE?

WHAT TOOLS ARE NEEDED?

TOP 3 CUSTOMER NEEDS	WHAT DATA IS NEEDED? WHERE IS THAT DATA LOCATED?	WHAT ARE THE CHANNELS WHERE THE PERSONALISATION TAKES PLACE?	WHAT TOOLS ARE NEEDED?

- Purchase history
- Relationship Length
- Age
- Frequency of buying
- Location
- Online activity
- Device
- Time of the day
- Gender
- Season

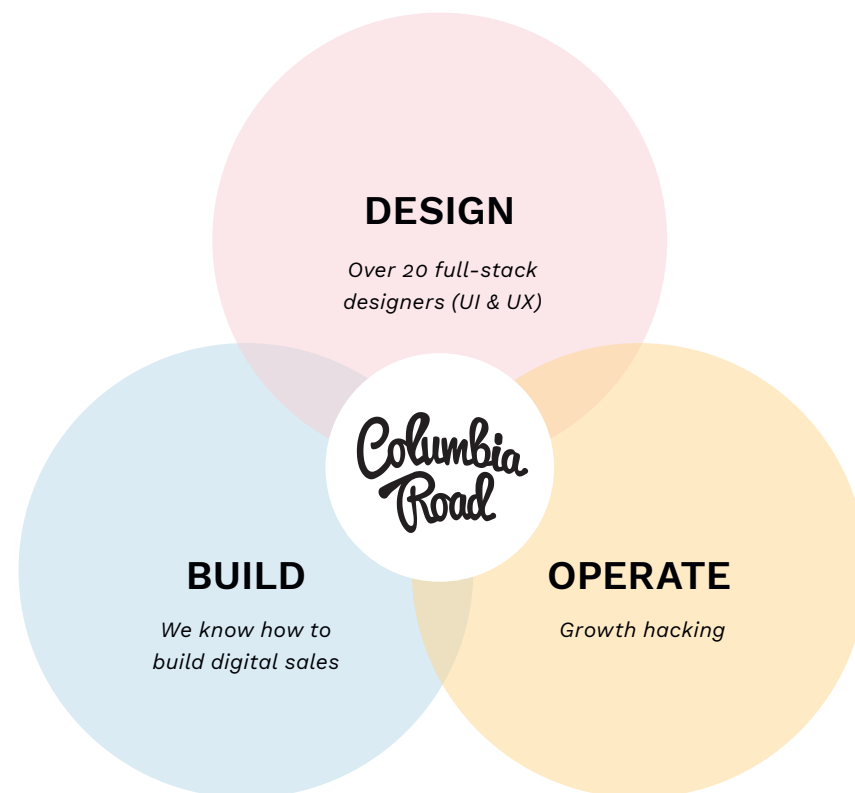
- Website
- Customer Portal
- AgWebstore
- Email
- App
- Chat
- Phone

- CRM
- CDP
- CMS
- Chatbot
- Email Marketing Tools
- Personalisation Platform
- Marketing Automation
- Recommendation Engine
- A/B Testing Tool
- Social Media Listening Tool

COLUMBIA ROAD AS A UNIQUE SALESFORCE PARTNER

Business-driven approach for the whole digital sales and marketing vertical. We help our clients to implement new Salesforce products and get the best business value out of their already existing Salesforce solutions.

- 1 / Technical build capabilities**
In addition to implementation of core Salesforce clouds, we help companies utilise the Salesforce platform data in their other customer and partner-facing solutions
- 2 / Implementation & sales culture**
We help companies with not just the implementation of Salesforce's services but with the adaptation of new technology.
- 3 / Service design and growth hacking methodologies**
The power of the platform lies in allowing to design relevant experiences for all the different types of stakeholders in and around an organisation, something that most platforms can't quite provide.
- 4 / Certified Salesforce consultants that understand your business goals**
Our consultants are certified in Platform, Communities, CPQ, Sales, Pardot, Service, and Marketing Cloud development in Salesforce.



TRUSTED BY



SELECTED AI CASES AND OUTCOMES WE HAVE ACHIEVED WITH OUR CLIENTS

Sales and marketing

+10%

Over target for
new meetings for
January 2023

+20%

Over monthly target
for new sales

+70%

Content
creation
efficiency

Customer care

- Manual tracking of customer feedback down from two days weekly to 30 minutes
- Enabling better decision making by leveling up customer care data analysis: from manually tagging customer calls to analyzing every customer call
- Partial automation of customer care tasks



We help companies sell better.

150+ people

Software development
Marketing technology
Design | Data

6 cities

Helsinki, Tampere
Stockholm,
Amsterdam
Munich, Berlin

200+ clients

Sales impact
created
since 2016



Columbia
Road

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