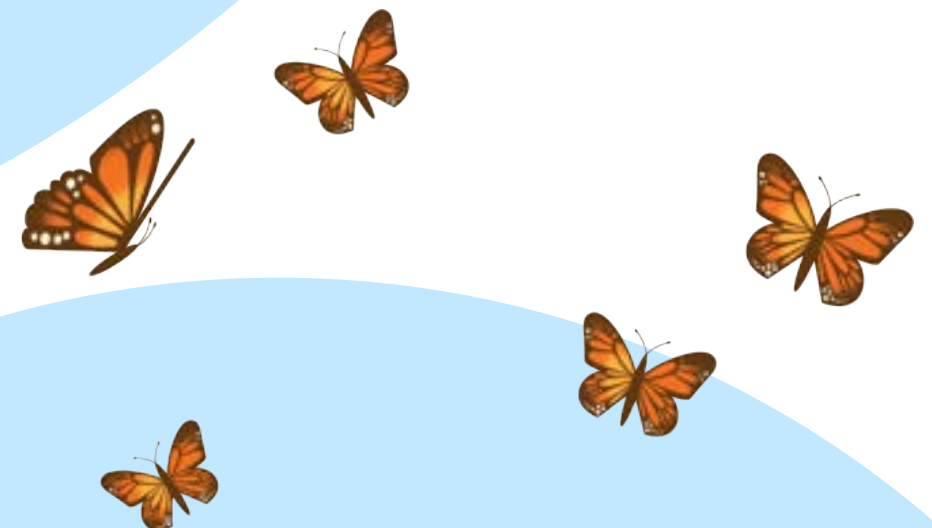


The Transformation *Guidebook*

Learn how to change mindsets, connect silos, and unlock customer-centric growth.



An Expert Point of View



Bryan Musto

Director, Head of FinServ and
Digital Experience

Salesforce recently released the Transformation Guidebook to help businesses of all sizes unlock customer-centric growth. Based on what Salesforce has learned from thousands of working sessions and projects with C-suite leaders, the guidebook uncovered patterns of how successful companies can change mindsets, connect silos, and get digital transformation right the first time. This ability to shift perspectives is essential because research shows that 84% of customers say the experience a company provides is as important as its products and services.



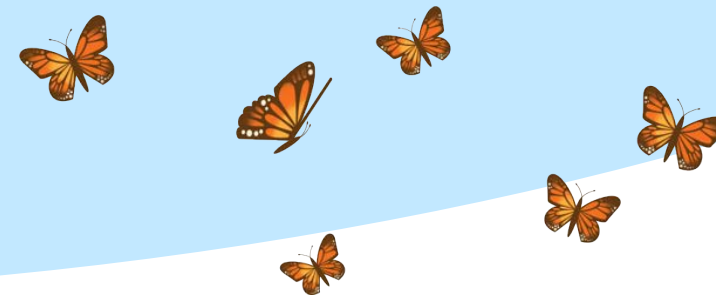
Proud Member of the Salesforce Partner Program approved to distribute this guidebook.

To assist you in highlighting some key takeaways for your company, we had the opportunity of getting additional insider information from Bryan Musto, Director, Digital Experience and Financial Services at A5. A5 has a team of over 200 skilled Salesforce consultants who help organizations leverage industry-leading technologies to increase scalability, promote cross-functional collaboration, enhance customer experience, and gain competitive advantage.

With all the challenges facing businesses today, why should investing in CRM be a priority?

Customer experience is the leading brand differentiator for a buying decision, leaving price and product behind. In this ever-demanding market, anticipating and catering to customers' present and future needs are the keys to success. This is best achieved by a CRM tool. There are a few reasons why it is crucial to invest in CRM now. A CRM system can help in constant communication with the customer, increasing engagement and building brand loyalty. These days, customers don't believe in praising or ranting at the business door.

An Expert Point of View



They do it on social media. With a CRM in place, it is easy to track the voice of the customer across all digital channels and help them appropriately in their area of need. A CRM can help maintain relationships with the customers too. It can personalize to create communications that can target the customer at the right time, in the right place, and the suitable medium of their choice. A CRM can also help the customers with what they want and not just what the business wants.

Supporting the customer whenever they need it is an excellent way of standing beside the customer in their journey or interaction with the brand. A CRM logs all the inquiries so that nothing gets lost and customers get the proper attention they deserve. A lot of customer complaints often go unanswered. However, with a CRM in place, dedicated email templates, and chat not can handle the first level of issues. Additionally, dedicated teams can take care of the next level of support to ensure the customer stays happy.

What's the first step a business should take to accelerate digital transformation?

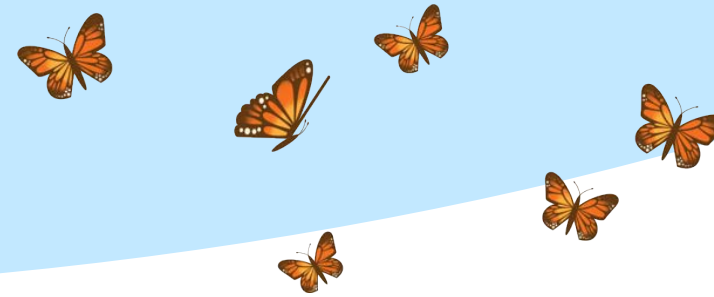
Most companies realize the importance of digital transformation but don't know where to start. The idea of a complete overhaul can be daunting. Most companies report success by simply finding an area to start and making change happen. Driving a customer-first revolution begins with the right mindset and the core discipline to go ahead with it. Organizations need to

shift their focus from product or service to the customer to lead this transformative change. Digital transformation requires a transparent culture that can embrace change. Breaking down the internal silos and getting executives and leaders on board with the new digital vision: herein lies the power of discipline to bring the change. Leadership invested in change plays a vital role in the digital transformation of an organization. Collaborative work culture across the teams, from top to bottom, needs to align together to bring about the shift.

When customers are increasingly concerned about privacy, how can businesses collect enough data to power an effective CRM?

Businesses must establish a clear data privacy policy and demonstrate total transparency about collecting and using all customer data. In a world so dependent on data and decisions derived from that data, businesses are responsible for taking all necessary steps to protect customer data. Companies accomplish this through data security tools, encryption, policies, and governance. We recommend our customers document their data security policies clearly and conduct regular audits of their security to ensure the safety of all customer data.

An Expert Point of View



How are your customers managing digital transformation?

When we approach supporting a customer's digital strategy, it is critically important to assess the overall business strategy first. Any digital or technology initiatives or spending need to be directly tied to a business objective. This objective is broken down by business unit for large businesses before rolling up to an enterprise-wide strategic vision. Once the business strategy has been validated and agreed upon by leaders, they can draft the digital roadmap accordingly. It is critical to define success and ROI targets for any digital tools and investments. It is also essential to create the correct KPIs to define success. Examples of these KPIs can be speed to market, customer engagement metrics, and innovation targets. For large organizations, it is vital to focus on a customer-centric journey, removing siloed customer data to have a complete view of the customer. This view helps us understand the customer better and engage them in more meaningful ways. We also guide our customers to view digital transformation as a journey as opposed to a destination. Finally, there must be a strategy to create a culture of continuous innovation and an agile organization to adapt quickly to change.

How can Salesforce help businesses unlock customer-centric growth right now?

A5 focuses on six key industries: High-tech SAAS, Financial Services, Manufacturing, Professional Services, Communication and Media, Health and Life Sciences. For each industry, we have specific solutions and accelerators to help our customers drive customer-centric growth. Agnostic to industry, we provide the following solutions to drive growth and focus on customer experience. Discovery and Research Experience, Design, Digital Architecture, Data and Analytics, Design Digital Marketing Engineering and Integration, Platform Management, Business Solutions Management, Customer Insights, Innovation and Management.



Bret Taylor

President, Chief Operating Officer, Salesforce

The global pandemic accelerated change across nearly every aspect of our personal and professional lives.

The question for all of us is how best to act when there's still so much uncertainty.

The key thing we've learned, alongside our customers, is that COVID-19 is an accelerant – an accelerant for change that had already begun. It supercharged a pivot to customer-centricity, to rethinking how you serve your employees and customers, the importance of employee experience, and how to reinvent yourself for the all-digital, work-from-anywhere world.

Yet conventional attitudes, silos, and legacy systems often stand between leaders and customer-centricity. And while technology can help, it alone is not the answer. Simply applying new technology to old ways of doing things won't magically change the way your teams deliver a great customer experience at scale.

I've noticed transformation happens when leaders stop focusing internally on technology, products, departments, or systems – and recenter around their customers.

It's easy to say, harder to do. We hope this guidebook helps you confidently lead change. Our work with thousands of C-suite leaders from organizations of all sizes and industries has uncovered patterns of what it takes for successful companies to get it right as they evolve to be more customer-centric.







Whether you're a CEO in financial services, a CIO in B2B tech, or another leader ready to make meaningful change, I hope this guidebook helps you bring the customer closer to the center of your business.

salesforce

Bret Taylor



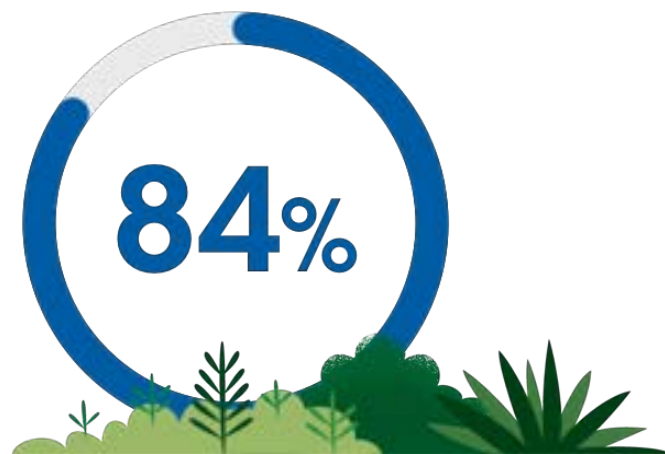
Contents

	Chapter 1	7
	Successfully Meeting the Digital Imperative Depends on Your Mindset	
	Chapter 2	9
	How You Make Decisions: Sense, Anticipate, and Respond	
	Chapter 3	14
	How You Engage Customers: Customer-Centric Business Processes	
	Chapter 4	18
	How You Work: One Team Aligned Around the Customer	
	Chapter 5	20
	How You Embrace Technology: Digital-First, Lean, and Ethical by Design	
	Chapter 6	25
	How You Serve Society: Business as a Platform for Change	

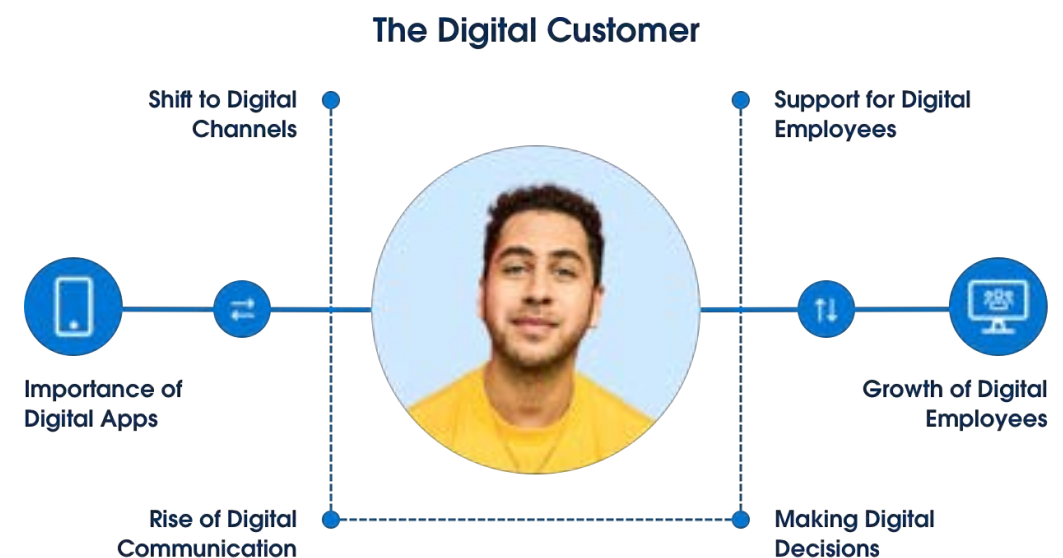


How to Accelerate Change with This Guide

Making fundamental shifts in the products or services you offer, and how your teams work together, can seem large and complex, but the steps outlined in this guide will help you make a plan and evolve. This guidance is based on what Salesforce has learned from thousands of working sessions and projects with C-suite leaders over our 21-year history.



Research shows that 84% of customers say the experience a company provides is as important as its products and services.



The urgent question facing leaders now is how to go beyond simply responding, to reimagining and acting differently. No matter what the future holds, building customer-centric thinking and structures rallies every department, employee, and stakeholder around customers' needs.

How can you make your business more relevant to your customers, partners, and employees, and make your company more resilient to future shocks?

That's why this guidebook is focused on an approach that puts the customer in the center of your feedback loop and innovation cycle. It provides “no regrets” moves every leader can make to begin now.

To work toward this transformation, get familiar with two key terms that we'll reference throughout this guidebook: **mindsets** and **disciplines**.

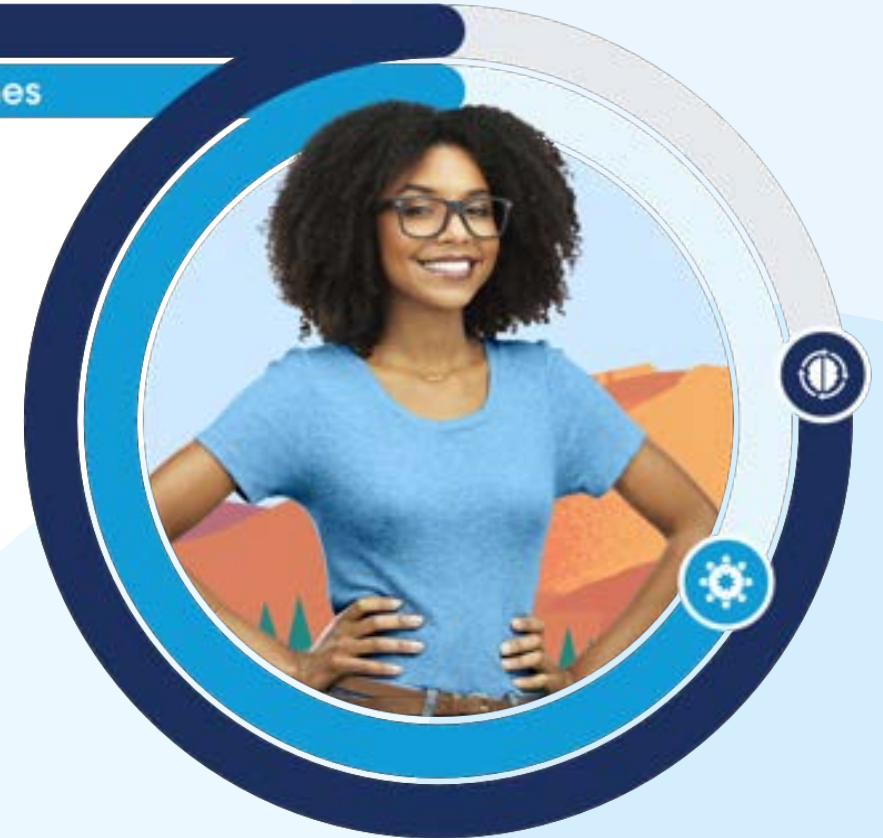
Mindsets: Mindsets are the common assumptions that shape how people behave, either holding companies back or propelling them forward.

Disciplines: Disciplines are customer-centric business practices that unite employees, departments, and partners to solve customer needs with the full force of the organization.

Across industries and functions, the core challenges are often the same – and so are the key steps to drive a customer-first revolution. This guidebook's six chapters will begin your journey with thought starters and practical tips.

Mindsets

Disciplines



Successfully Meeting the Digital Imperative Depends on Your Mindset

While the pandemic has accelerated massive change, one important lesson we've learned is that your industry does not define your destiny.

In fact, there have been winners and losers in every industry, depending on the actions of individual companies. We've seen a performance gap between those leaders who lean into digital and those who are waiting for the "old normal" to return. In general, companies have had one of these responses.

Those with a **RENOVATE** mindset approach things with a wait-and-see attitude. Their workforce is not digitally enabled, they're not building ways to anticipate their customers' new needs or make sense of the data they have, and their leaders don't understand digital. As a result, their growth plummeted in the worst of the crisis, and as the broader economy recovers, they've rebounded much less than others.



Renovate

How do we optimize our existing business?



Transcend

How do we create customer value in new ways?

This is in stark contrast to those with a **TRANSCEND** mindset. Companies that were born digital, even before COVID-19. Amazon, Netflix, and Zoom are well-known examples here. They were built for this all-digital world



They designed around their customers' evolving needs and are laser-focused on speed, simplicity, and personalized experiences.

Many of our customers have what we call an **EVOLVE** mindset. They weren't born digital, but they are deliberately refocusing on their customers' needs. Most were already on a journey towards digital before COVID-19, but the crisis enabled them to smash through old bureaucracy and change faster than anyone thought possible.



These companies share a clear imperative: to reinvent themselves for this digital-first, work-from-anywhere world.

Here are five customer-centric disciplines we have seen successful companies use to evolve and thrive through digital transformation. These are so critical to success in this new all-digital era that they are the foundation for how our Salesforce Customer Success teams help customers maximize the value they can realize across all Salesforce products.



How You Make Decisions Sense, Anticipate, and Respond

Your organization needs to win the race for relevance.

You need to be able to sense, anticipate, and respond to changes in your customers' needs. This will enable you to stop treating every customer interaction with you as if it were their first.

You'll start by organizing yourself around their profile, identifying more specific contextual opportunities to expand what you can cross-sell and upsell. This will then prepare you to expand beyond commodity transactions by understanding the broader "job to be done". You'll be able to identify adjacencies you don't currently serve and expand into those broader areas or more closely partner with an ecosystem; for example life interests, education, health, financial wellbeing.



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What the employee wants hasn't changed dramatically. They want to get their job done, know what's going on with their organization, and advance in their career. We learned not to let leadership hierarchy interfere. Let the leaders on the ground make the decisions best for them.

Dan Torunian

PayPal Vice President, Employee
Technology and Experiences and
Data Centers



This means auditing who your customers are and what their needs are. You need to think about how you earn this data from your customers, as you are incrementally building trust. You need to integrate the data together to create useful insights. And then you need to share it across the right teams, often breaking down a historical culture of hoarding where people believe “information is power.”

This is not about flooding the company with dashboards. How you visualize those data as actionable insights, share it, and collaborate around it becomes your data culture.

The stronger this data culture is, the more decisions your teams can make, faster – and the better your customers will reward you with more data. The more this happens, the greater your ability will be to understand and anticipate your customers’ needs before they do.

**Proficiency**

Establish training and education programs to build and scale data proficiency across the organization

**Agility**

Create access to trusted data sources, making it easier for anyone to find relevant data

**Community**

Create a community and Center of Excellence to build internal data expertise

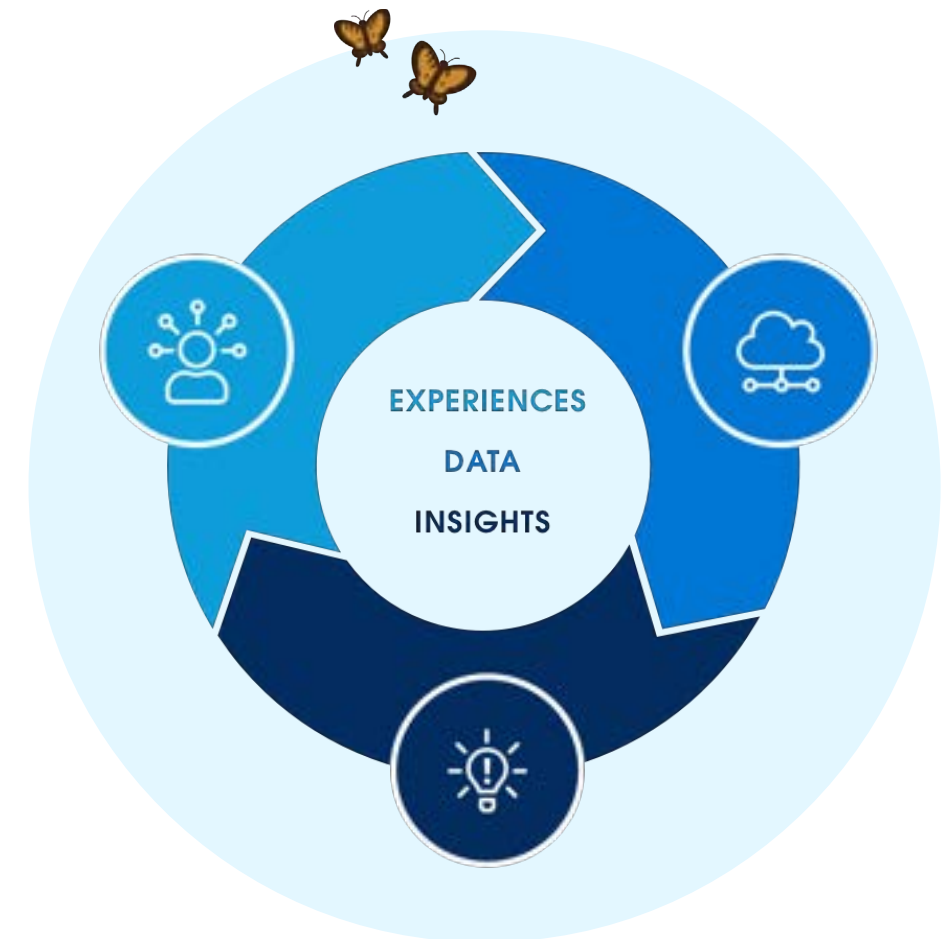


Create a Data Flywheel That Fuels Customer Success

The best companies focus intently on earning and re-earning customers' trust. Customers show their trust in two connected ways: They give you their money and their data. The best way of earning more data is by using existing data to generate insights that become the DNA of improved experiences – which, in turn, earns you more data. And so the flywheel keeps spinning as long as you deliver what the customer wants: experiences that feel as effortless as possible.

When Salesforce was founded in 1999, we offered only a small fraction of the technology we offer today. We grew into customer service, marketing, ecommerce, and more because our customers asked us to.

Our whole business is predicated on listening and delivering. Customer feedback is the engine that drives us – and it'll help you evolve, too, for what comes next with your own customers.



Get Started: Embed Customer Listening in Your Business

Before you commit to too many changes, ask yourself and your peers: What stories are our customers telling us? Have we listened deeply to customer feedback recently? Embed customer listening into your company's DNA to ensure transformation efforts are hyper-focused on their needs.



To prioritize where to ignite change, it's best to get an understanding of top needs for each customer persona. Here are some of the best practices Salesforce follows:

1. Create a voice-of-the-customer function. The right program will have both business-focused research leaders and a neutral reporting structure. That way, the team responsible for delivering improvements isn't also keeping score. Get feedback from customers to establish a baseline and set a single improvement goal as your starting point.

2. Invest in listening at every level. Target all personas in your ecosystem. Which customer groups experience the most pain? Which drive the most revenue? Who are your greatest brand advocates? Don't fear their feedback.

3. Integrate insights into one narrative. Tell one story behind the numbers. Just as you want to balance your listening across channels, you want to balance your data with a story. Listening tours, advisory boards, and focus groups bring color and context to scorecards and trendlines.

4. Operationalize insight reviews. Integrate customers into strategic planning, and assign an accountable owner to each metric or measurement that stems from what you learned when listening. Does the executive team plan future products or programs at an offsite or every Monday morning? Wherever planning takes place, save a seat at the table for the customer's voice.

5. Invest in intelligence and automation to drive accountability. Automating analysis and reporting saves your team valuable time. A sensing tool or machine layered on top of your qualitative feedback is one of the most effective ways to unlock insights.

6. Inspire a customer listening movement. Sometimes the team sharing customer feedback is perceived as the “bad news” team. Instead, motivate your team and your stakeholders to stay engaged and keep acting on customers' needs by recognizing results and rewarding teams that become listening champions.

7. Close the loop with your customers. Listening means you need to communicate. It's unrealistic to take action

on every piece of feedback, and customers don't expect you to do everything they ask. But they do expect to hear back from you on what you are doing, what you're not able to do, and what else you need from them for a successful partnership.

Designate enough time and resources to rethink your current sense-and-respond capabilities and make a change. How can you evolve the legacy patterns on the left to the greater-value practices on the right? Get serious about uniting your marketing, sales, commerce, service, and IT teams to actually hear what customers are saying and make changes.

Throughout this process, cultivate an environment of psychological safety as a leader. Give teams the freedom to experiment and learn, and ensure everyone feels safe to offer criticism and share what's not working.



How You Engage Customers

Customer-Centric Business Processes

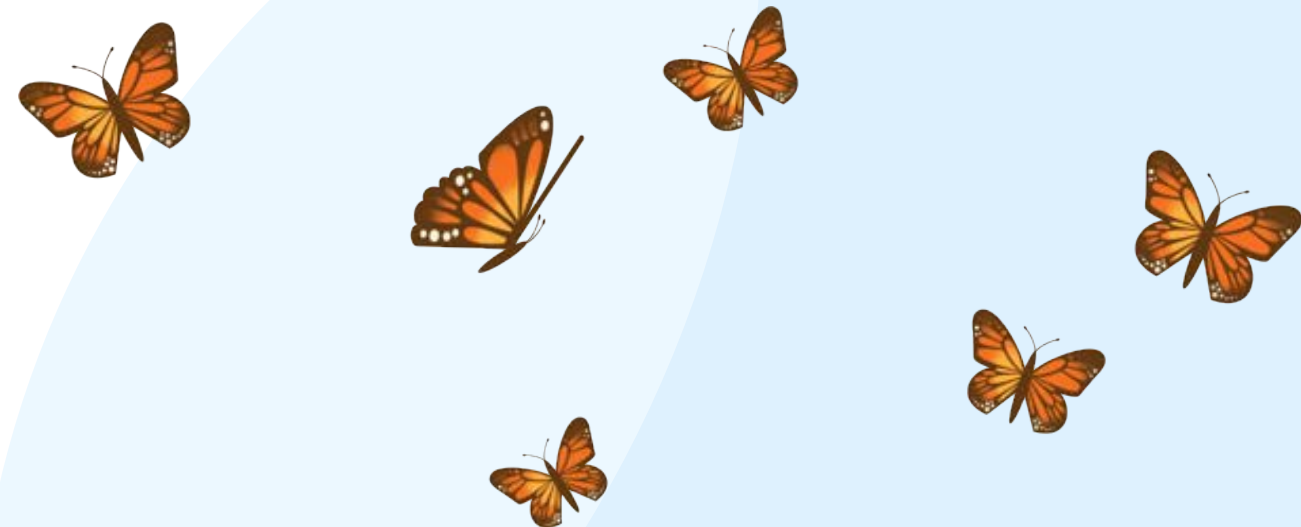
You can't simply translate your old processes into digital.

Your business practices are your company's habits – repeatable behaviors that enable you to scale effectively. In a product-centric world, these business practices optimize how you manufacture, market, sell, and service your products. In a customer-centric world, you still need to do all of that, but you also have to think about those activities from the customer's perspective.

Your goal: Make it easy for employees to make it easy for the customer.

Well-designed customer experiences have never been more relevant. Here's the evidence, according to research:

Salespeople – once solely focused on closing transactions – now track customer satisfaction more than any other metric.



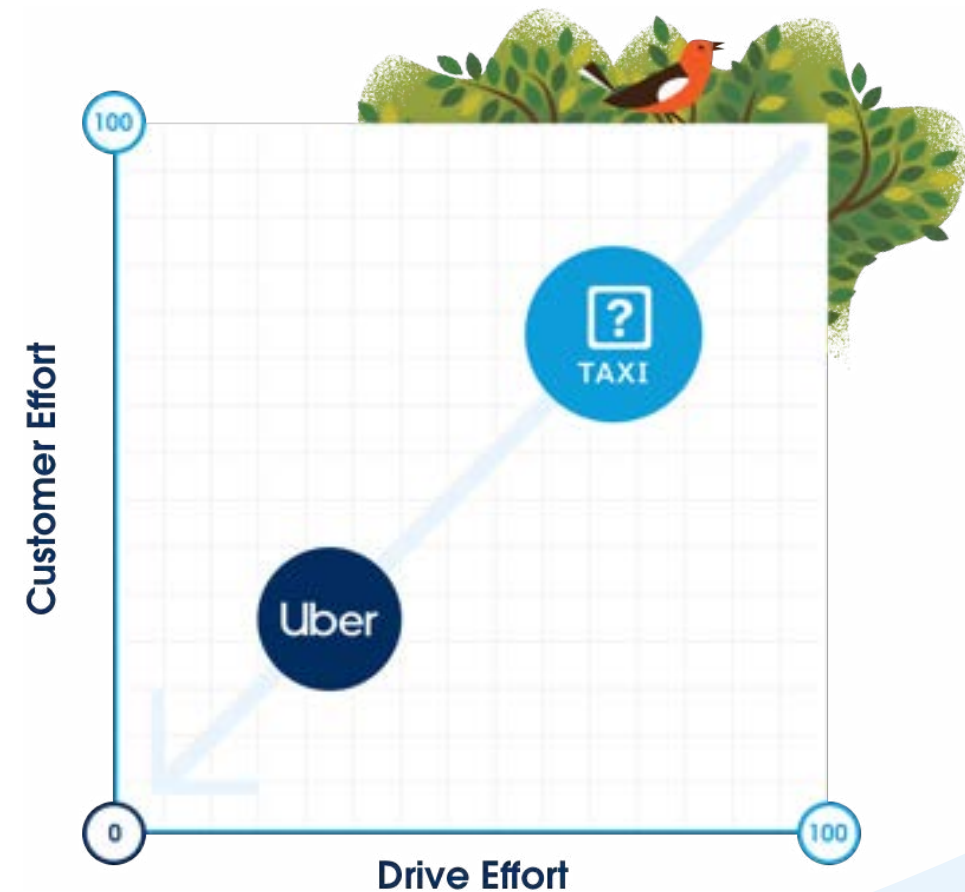
The majority (88%) of high-performing marketers say they lead customer experience initiatives across their organizations.

Even leaders in information technology (IT) now cite customer experience as their top priority.

Redesigning business processes to be customer-centric means moving away from seeing your business as selling to seeing it as serving. It means leveraging customer insights to deliver more personalized experiences, including tailored recommendations. It also means streamlining customer touchpoints to increase speed and reduce effort.

The only way to deliver excellent experiences is to enable employees at every stage of the customer's journey. For example, reducing the number of steps in a transaction could be the start of a journey toward making that whole transaction invisible.

Consider the way Uber redesigned the entire experience of getting a cab. They looked at every area of friction and simply removed it. No standing in the rain hailing a cab, no waiting to exit your ride to pay. At the same time, they made it easy for drivers to find riders. This combination of improved customer and workforce experience revolutionized an industry.





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New habits are being formed every day. One thing we found surprising was the number of customers coming to Sonos.com and purchasing without ever having heard it or seen it. A conventional belief for our business is that people need to see and hear the product, but we've been able to overcome that. And these are not inexpensive products – some are \$800. People are learning to trust brands and directly engage with brands.

Patrick Spence

Sonos Chief Executive Officer

Define the Jobs to be Done

The heightened stakes for customer expectations mean you have to solve for customers' "job to be done" in every moment. According to Harvard Business Review, your customer's job to be done is "the progress that the customer is trying to make in a given circumstance – what the customer hopes to accomplish."

By defining your customers' jobs to be done, you'll be in a better place to meet their needs and reconfigure your business practices to respond to their demands. This way, you're staying focused on them, rather than your own products.

This helps you develop a holistic view of the customer and how they're using your products and services to solve real challenges in their lives. Invest time in learning who your customers are and why they behave as they do.

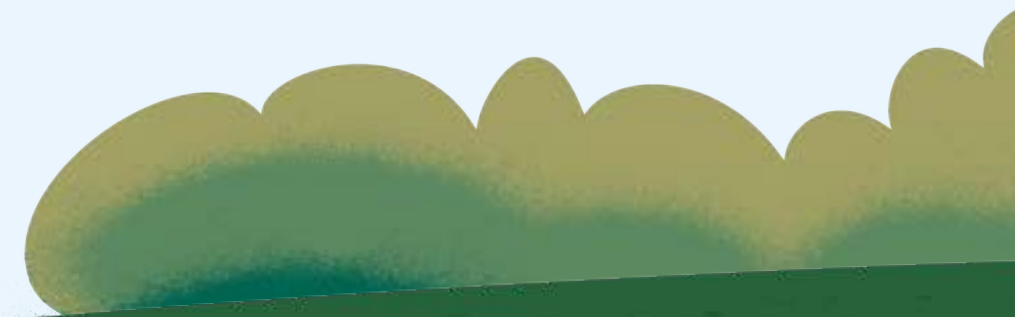


Get Started: Pick One Customer Touchpoint

Speak to your customers, and they'll surely give you an example of an inconvenient or clunky touchpoint with your company. Bring together stakeholders from all of the teams that influence that moment to explore how you might fix it. For now, focus on that single touchpoint and the teams and time frames needed to address it.

For example, why should customers have to call you if there is an issue? Can you identify the issue and proactively engage to solve it? With the right data and processes in place, your airline could move you from a cancelled flight to an alternative before you even know it's cancelled.

Put yourself in your customer's shoes and imagine what they need, when, and why. Find a way of making it effortless for them to get what they need.



How You Work One Team Aligned Around the Customer

In a digital-first world, where the customer is at the center, everyone sells a service.

The challenge is how to orchestrate the full power of your organization so it can best serve the customer. Most organizations operate in rigid silos, with lots of bureaucracy, making collaboration hard. It's a bit like watching a really bad 4 x 100-meter relay team where everyone is a great sprinter, but no one can pass the baton.

Creating one team aligned around the customer requires employees to be better empowered. They naturally need the right tools to collaborate and share information. This is the era of the augmented employee, who continually adopts new digital tools to raise their customer-facing performance. However, the need is greater than tools.



Customer-facing employees also need better training to be more empathetic than before, ask better questions, and be better listeners and storytellers.

These needs in aggregate are highlighting a major deficiency in continual learning. The shift to an all-digital world has made this gap more apparent and critical. Salesforce's Global Stakeholder Series: Future of Work, Now research surveyed more than 20,000 people around the world and found that around two-thirds feel they lack in-demand skills and wish they had access to free technical training.

The pandemic has also revealed another unresolved issue: Many workers have worrying levels of stress and concerns about health, with 79% of survey respondents saying workplace safety should be a higher priority.

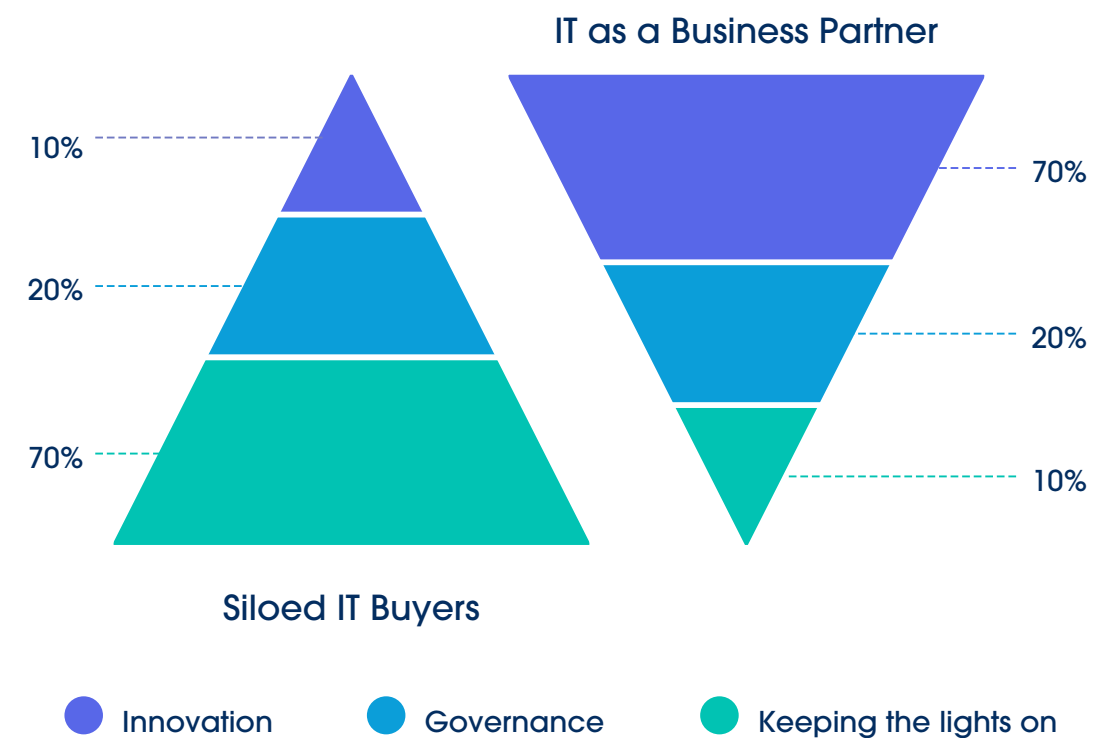


How You Embrace Technology. Digital-First, Lean, and Ethical by Design

Adapting to a digital-first world requires fundamental rethinking of the essence of the company.

Brian Moynihan, Bank of America's CEO, said it best: **"We're a technology company wrapped around a great bank."** You could be a bank, telco, retailer, or healthcare company, but soon you'll have to be a digital company wrapped around that organization, with your own versions of the tools and approaches that software companies use every day.

This means you need to move from having lots of departmental IT to having an enterprise digital operating model. Think of it as moving towards having the leanest possible tech stack.



Start by articulating the digital operating model that will bring to life your digital customer strategy. This should be a joint effort with a strategic investment plan owned by both business leaders and IT leaders. The investment plan should be prioritized after fully defining the new capabilities needed in both the business and IT, with agreement on the most critical outcomes needed how those will be measured.

For most businesses, this flip starts with a simplification program that reduces the number of apps, and moves as much as possible into the public cloud. You build capabilities once well, with the intention of infinite reuse.

Teams can then leverage shared data, processes, apps, and APIs to create capabilities quickly. Development is agile, leveraging “devops” teams who deeply understand the business. Low-code and no-code tools empower business analysts to build the capabilities they need.

Create a Single Enterprise Digital Governance Model

The next step is to define a governance model that underpins the digital operating model. In many companies, the core

challenge with simplifying their technology is that different departments have wildly different levels of understanding and comfort with technology solutions.

This results in teams working in silos, without a “single source of truth” for customer data, and running multiple initiatives across the business that don’t reuse apps or other development components.



Our most successful customers structure a governance model that includes a Digital Transformation Office to oversee program management and ensure alignment across multiple tech initiatives.

This team focuses on three strategic objectives:

Empower teams to create more seamless and frictionless customer experiences

Maintain the company's overall technology architecture and create visualizations to assess the value of initiatives in the strategic investment plan

Provide technology expertise to help business leaders understand how to maximize shared processes, APIs, and data, and reuse them across the company

Build a Deliberate Path to a Single Source of Customer Truth

In a recent Salesforce-commissioned study of nearly 500 business leaders, Forrester Consulting found 80% agreed that a single source of customer truth would create “significant” or “indispensable” value for their company.



For many companies, not having a single view of customer data across touchpoints makes it impossible to deliver personalized experiences.

Imagine a customer calls support to ask about a back-ordered item. The call center agent can't see the actions that customer has already taken online, only a static customer record. So the agent misses a chance to give the customer confidence in one of the alternate items sitting in their cart.

And these missed opportunities just continue to pile up if call notes require logging in to another app. No one gets a full picture of what the customer is trying to achieve and can't take action that could deepen the relationship.

Here, your CRM platform plays a critical role. That's because it:

- **Consolidates** the number of tools needed for your workforce to do their work
- **Empowers** employees closest to customers to deliver the right experiences at the right time
- **Delivers** insights and recommendations, not just data
Makes customer data **easily shareable**
- **Keeps you flexible and connected** in an age of APIs, IoT, and the platform economy

Be deliberate about building an ever-deeper customer profile. Map the journeys you want customers, employees, and partners to take. Then figure out how to find the data that can help you achieve specific outcomes along those journeys. Connect the islands of data living in different departments



through reusable APIs. Purposefully design the experiences employees have inputting data so they are easy and friction-free. This increases people's comfort level and adoption of new solutions. Last, determine data access by considering similar roles across the company, rather than department by department.

Ensuring the Ethical Design, Development, and Use of Technology

In making your process lean, it's also critical to ensure your technology is used ethically. This helps prevent future development issues and ensure responsible and innovative use of your technology.

Just like transformation itself, technology ethics is not a checklist, it's a mindset. These are complex, human issues, and the prize is a culture in which everyone owns thinking through the consequences of technology. Two factors to consider are:

One practice that can help is Consequence Scanning, an agile methodology created by DotEveryone that engages employees in envisioning potential unintended outcomes of releasing a new feature and determining a plan to mitigate them. It's lightweight for all teams – see how in this article.

In technology, there's often demand for fast innovation. But the pressure to act quickly does not eliminate the need to be



thoughtful. Designing with civil liberties and human rights in mind will lead to greater trust, engagement, and adoption with your customers. Consider making ethics by design part of how to conduct business, and integral to the day-to-day work of designing, developing, and implementing your technology.

How You Serve Society Business as a Platform for Change

Recent times have heightened demand for true corporate social responsibility.

According to Salesforce's Global Stakeholder Series: Future of Work, Now, a majority of people feel that businesses should give back to the community and make addressing global inequalities a high priority. In the past, the public didn't expect much more from companies than jobs and wealth creation.

Now, every business needs to play an active role in moving the needle on critical societal issues, like diversity, equity, and sustainability.

Making progress in these areas isn't just the right thing to do; it's also a significant business opportunity. Research has shown that more diverse organizations are more innovative and perform better than more homogenous ones, and leading the pack on sustainability can create a lasting competitive advantage.



This means it is critical to put in place leadership, measurement, and reporting around your social programs. This is a change from simply writing a check to turning your company into a platform for change, energizing your employees to act, and putting in place programs that makes this easy for them.

Here are three impact areas that directly influence how customers and employees view your company.

Equality

As we navigate not only global health and economic crises, but also a social crisis that has further amplified systemic racism and inequalities, leading with our values is more important now than ever. At Salesforce, equality is a core value.



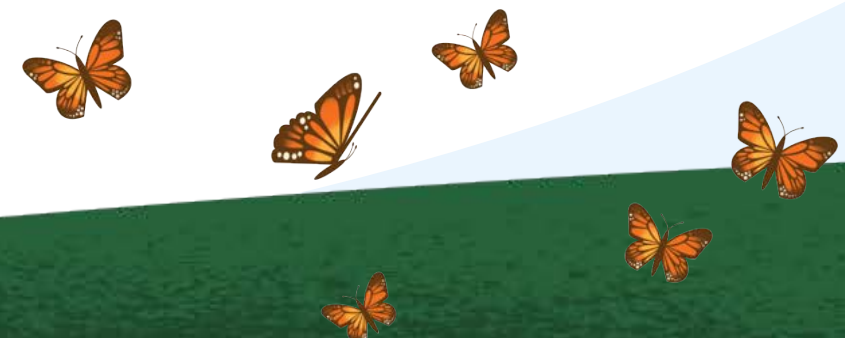
We believe that businesses can be powerful platforms for social change and that it is our responsibility to further equality for all.

Creating a culture of equality isn't just the right thing to do; it's also the smart thing – empowering employees to innovate, build deeper connections with our customers, and ultimately to build a better company.

It's not enough to take a stand for equality, but as leaders, we are called to take action. To help drive systemic change in our workplace and community, consider these four pillars. At Salesforce, we have a Racial Equality and Justice Task Force to drive them forward.

We all have a role. Actions you can take:

In order to ensure a fair, equitable, and inclusive workplace, it's important to establish and share standardized inclusive practices for all employees to learn and put into action. This ensures inclusion at every stage of the employee lifecycle, from how you attract, recruit, retain, promote, and develop your talent.





Employee Journey

Consider creating Employee Resource Groups (ERGs) if your company does not have them.

These are employee-led organizations that support our underrepresented communities. Empower each group

with a budget, offer paid volunteer time for ERG members, and partner to create professional career development initiatives.

Hold your company accountable by setting representation goals and tracking against them. Consider sending people leaders a monthly scorecard which includes: headcount, hiring, attrition, and promotion data by gender and race (where applicable) with prescriptive actions based on data to help increase access to opportunities.

Sustainability

Climate change is the greatest challenge humans have ever faced, and its effects weigh heaviest on the world's most vulnerable communities, amplifying global inequality. At Salesforce, we consider the environment to be a key stakeholder, and we are committed to harnessing our culture of innovation to improve the state of the world and create a sustainable, low-carbon future and economy.



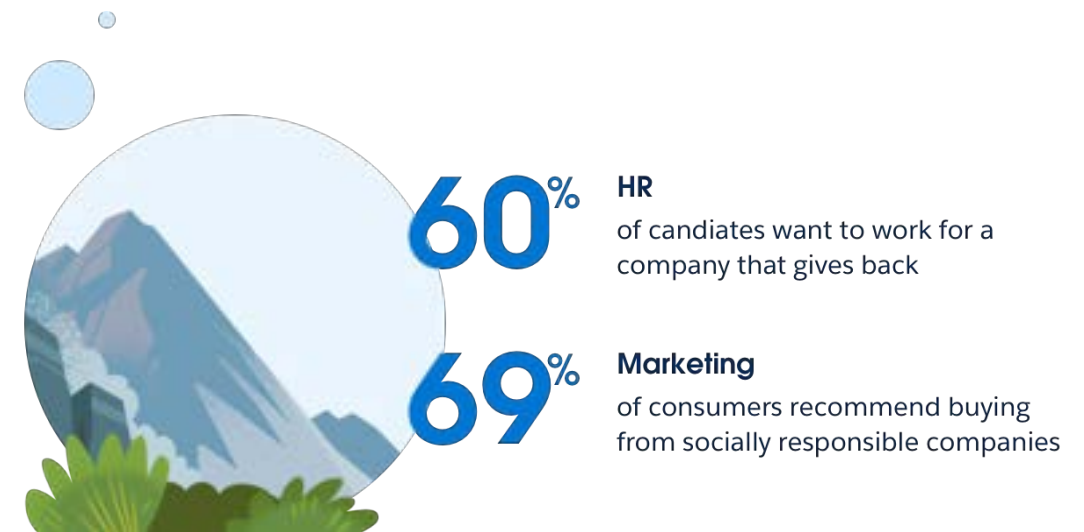
Carbon accounting is the first step to understanding a company's environmental footprint, with the hopes that this data can drive actionable insights, like setting realistic reduction targets.

We leveraged the power of Salesforce technology to create a solution that empowers businesses to quickly track, analyze, and report reliable environmental data to help them reduce their carbon emissions. In response to recent health concerns, many workforces are traveling less and mostly working from home.

Philanthropy

Giving back has been part of our DNA since day one, but it's never been more important than it is now.

At Slesforce, we are focused on bringing community and opportunity together. We know that values create value: Socially responsible companies tend to have higher employee retention, greater customer loyalty, and even stronger sales.



Here are some ways companies can build a culture of giving back:

Listen to your community.

Our communities hold the best solutions to our toughest challenges. Start by listening to their needs and ideas, and support them on their journey. As our communities continue to experience new challenges, we need to work hand-in-hand with them to create new solutions. Assess your resources, embrace flexibility, and pivot your programs to best support communities in this moment and those that lie ahead.



Make a commitment from the top.

A great culture is both top-down and bottom-up. It starts with instilling a commitment at the highest levels of your company like adding philanthropy in your annual goals and measuring your community impact as rigorously as you do your sales goals. Research shows that employees expect their leaders to lead in social impact: 76% of employees want CEOs to take the lead on change instead of waiting for government to impose it.

Empower your employees.

You can encourage your employees to give to the causes they care about by offering them volunteer time off and matching their donations. Your employees are your greatest asset, and by fostering their passions, you can leave a lasting mark on your communities.

Resources to get you started.

Since Salesforce pioneered the 1-1-1 model, Pledge 1% has grown into a global movement where giving back is baked into the DNA of companies of all sizes from the very beginning. These companies have pledged a combination of giving back 1% of equity, profit, product, or employee time. Head to pledge-1percent.org to get started.

Conclusion: How to Learn More

Preparing your company to adapt and flex for future shocks is no easy feat. But, recentring your focus on the customer makes it achievable.

Start by putting structures in place now to help you rapidly sense, anticipate, and respond as customers' needs change. Then, purposefully redesign and realign your business processes, teams, and technology to create amazing, frictionless customer experiences. To cultivate genuine loyalty with customers, consider ways your company can act as a platform for change.

The urgency is real – and so is the potential.





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