



From Idea to Application Using **Clicks, not Code** on the Salesforce Platform



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Distinguished Solution Engineer,
Salesforce Public Sector





Today's **Agenda**

Salesforce Company Overview

Salesforce Platform Overview

From Idea to Application in ~80 Min

Free Training Resources

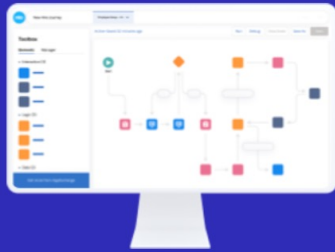




Register for a **FREE** Salesforce **Development** **Environment (DE)**

<http://developer.salesforce.com/signup>

Terminology: Salesforce Organization ("Org") | Salesforce Instance | Salesforce Environment | Salesforce Account | Salesforce



Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for a free Salesforce Platform Developer Edition Environment

<https://developer.salesforce.com/signup>



Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

First Name*	Last Name*
<input type="text" value="Your first name"/>	<input type="text" value="Your last name"/>
Email*	
<input type="text" value="Your email address"/>	
Role*	
<input type="text" value="Your job role"/>	
Company*	
<input type="text" value="Company Name"/>	
Country*	
<input type="text" value="Select Country"/>	
Postal Code*	
<input type="text" value="Your postal code"/>	
Username*	
<input type="text" value="Ex. name@yourcompany.com"/>	

By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Master Subscription Agreement](#) and to the storing and processing of your personal data by Salesforce as described in the [Privacy Statement](#)

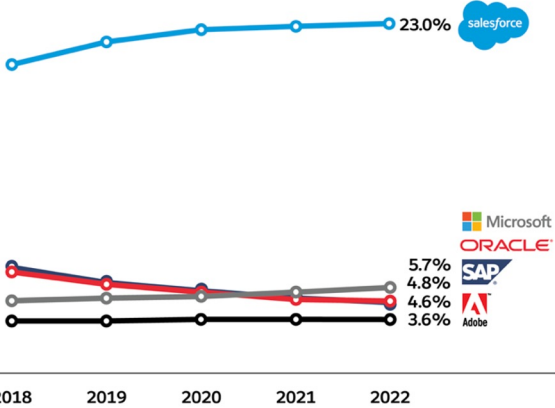


Salesforce Company Overview

Our vision since 1999
**Connect with
your customers
in a whole
new way**

Salesforce. #1 CRM.

Ranked #1 for CRM Applications based on IDC 2022
Revenue Market Share Worldwide.



Source: IDC, Worldwide Semiannual Software Tracker, April 2023. CRM market includes the following IDC-defined functional markets: Sales Force Productivity and Management, Marketing Campaign Management, Customer Service, Contact Center, Advertising, and Digital Commerce Applications.

Government is in the Customer Service Business

Salesforce CRM provides a 360 view of customer interactions across all programs & services



What is Salesforce?

<https://www.youtube.com/watch?v=xx2sK-QiRiw>

Get Connected to Your Dream Job

The Salesforce Economy is Booming

“For Salesforce, it’s not only about creating new technology and career opportunities; we have to pave pathways to these new jobs,”
KRIS LANDE, SVP TRAILBLAZER ECOSYSTEM, SALESFORCE



Global Jobs
11.6M
New Salesforce economy jobs by 2028

Global Economic Impact
\$2T
New business revenue by 2028

*Source: IDC White Paper, sponsored by Salesforce, “The Salesforce Economic Impact,” doc #US48214821, September 20, 2021.



SALESFORCE ADMINISTRATOR

Admins know their Salesforce Org inside out. They spend time automating business processes, and support their users



\$122,000
\$97,000



£53,000
£38,000

SALESFORCE DEVELOPER

Developers come to the rescue when requirements go beyond declarative (point-and-click) configuration tools.



\$144,000
\$109,000



£77,000
£52,000



BUSINESS ANALYST

'The technical translator', forming the bridge between business stakeholders and the technical team. BAs need both business thinking & knowledge of Salesforce platform capabilities.



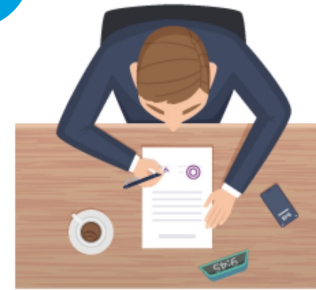
\$134,000
\$109,000



£68,400
£56,000



salesforce



PROJECT MANAGER

PMs will oversee every element of larger Salesforce projects, including functional/technical resource, timelines, and budget.



\$141,000
\$120,000



£87,000
£70,000



SALESFORCE CONSULTANT

Consultants are brought in to solve client problems with a fresh pair of eyes. They need to adapt to changing environments and have a broad knowledge of the platform.



\$145,000
\$123,000



£70,000
£54,000

TECHNICAL ARCHITECT

Referred to as the 'one percent', TAs need to construct superior Salesforce infrastructure, interwoven with related technologies.



\$167,250
n/a



£142,200
£110,700



<https://www.salesforceben.com/average-salesforce-salaries-infographic/>



Salesforce Customer 360 Platform Overview



Blazing Your Trail | The Salesforce Customer 360 Platform

SaaS

Rapidly Build Custom Enterprise Applications

Marine Animal Reporting App	Benefits Case Management	Adult Protective Services
Professional Licensing	Continuing Education & Training	Complaints Management



Sample Application Use Cases

Complex Case Management	Health Exchanges	Next-Generation 311
Email Management	Social Command Center	Correspondence Management
Employee Community	Web Self-Service	Knowledge Management
Mayor's Dashboard	Analyze Business Processes	Current, Historical & Big Data

PLATFORM CORE SERVICES

Identity & SSO Management	Role-Based Security	Field Audit Trail	Platform Encryption	Event Monitoring	Lightning Flow	Workflow Builder	Approvals Engine	Assignment Rules	Escalation Rules	Omni Channel	Einstein AI Services	Geolocation Services	Sandboxes
Open APIs	Salesforce DX	Schema Builder	Global Search	Duplicate & Match Rules	Alerts & Notifications	Reports & Dashboards	Chatter Collaboration	Mobile Apps	Chat Bots	Live Chat	SMS Messaging	File Management	Task Management

SALESFORCE FedRAMP GLOBAL ENTERPRISE CLOUD INFRASTRUCTURE SERVICES

Global Data Centers	Multitenant Cloud Database	Metadata Architecture	Database Backup	Database Failover	Continuous Site Switching	Disaster Recovery	Global Network Fabric	Redundant Networks	Bulk Data Processing	Query Optimization	N+1 UPS & CPS Power	Fire Detection & Suppression	Intrusion Detection
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PaaS

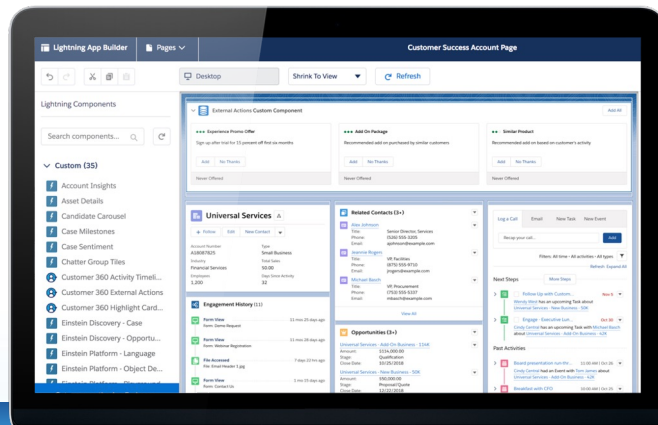
Move Freely Between the Worlds of No-Code & Code



Most Salesforce Development Accomplished with Clicks, Not Code

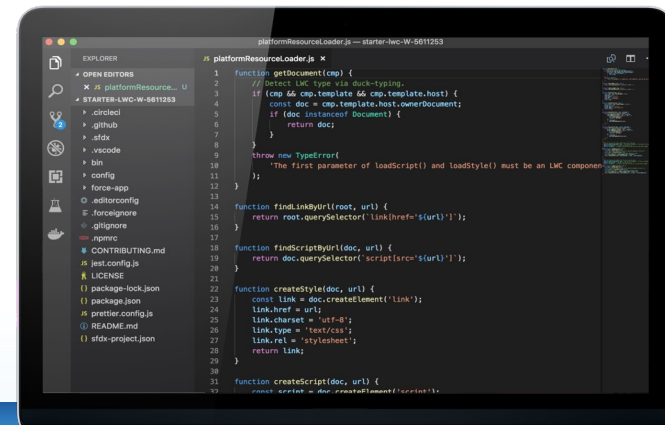
Low-Code Builders

Leverage standard, custom, or AppExchange components



IDEs

Create custom components and code using open web standards



Lightning Platform

Salesforce Einstein: Pioneering AI for CRM Since 2014

salesforce

1 Trillion+

predictions a week



2016
Salesforce
Einstein

SFDC AI
Research
Founded

RelateIQ
Acquired

Acquired
PredictionIO
& MetaMind

Vision and
Language

Bots

Paved way for
prompting with
DecaNLP paper

Prediction
Builder

Acquired
Bonobo

Conversation
Insights

Recommendation
Builder

Einstein
Search

CodeGen
LLM

Einstein
GPT

ProGen
Paper

Slack
GPT

Tableau
GPT

CodeTF &
CodeT5+
LLMs

210 AI
patents

227 AI research
papers

2014

2015

2016

2017

2018

2019

2020

2021

2022

2023

Customer Service AI Available Today

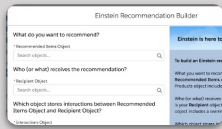


AUTOMATE

Bots*
Help customers find answers without having to speak to an agent



Recommendation Builder
Deploy real-time, personalized recommendations to drive service

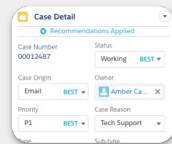


213% ROI in 2 years with AI

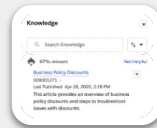


ASSIST

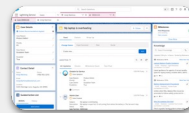
Case Classification
Predict relevant case details in any language with ML



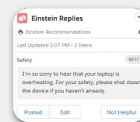
Article Recommendations
Identify & recommend the best articles based on case details & text



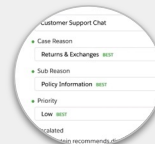
Case Routing
Use route rules to deliver cases from any channel to the right queue



Reply Recommendations
Use a catalog of common replies & recommend the right, contextual response

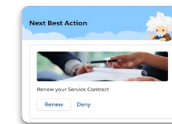


Case Wrap up
Leverage ML to suggest field values based on closed cases & transcripts

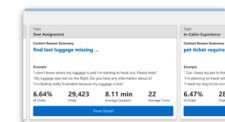


OPTIMIZE

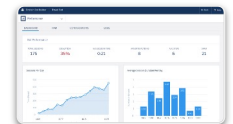
Next Best Action
Surface personalized recommendations based on Salesforce & non-Salesforce data



Conversation Mining - In Beta
Save time analyzing case data by automatically identifying the most common contact reasons



Service Analytics
Use pre-built dashboards to discover insights & take action



Service Cloud Einstein

Service Cloud, the World's #1 Service Platform

Salesforce Einstein Service AI

salesforce

Personalize every interaction with trusted CRM data

Boost service productivity & drive faster resolutions

Drive efficiencies on one, connected platform



Service Replies

GA July 19



Work Summaries

GA July 19



Knowledge articles

Pilot Now



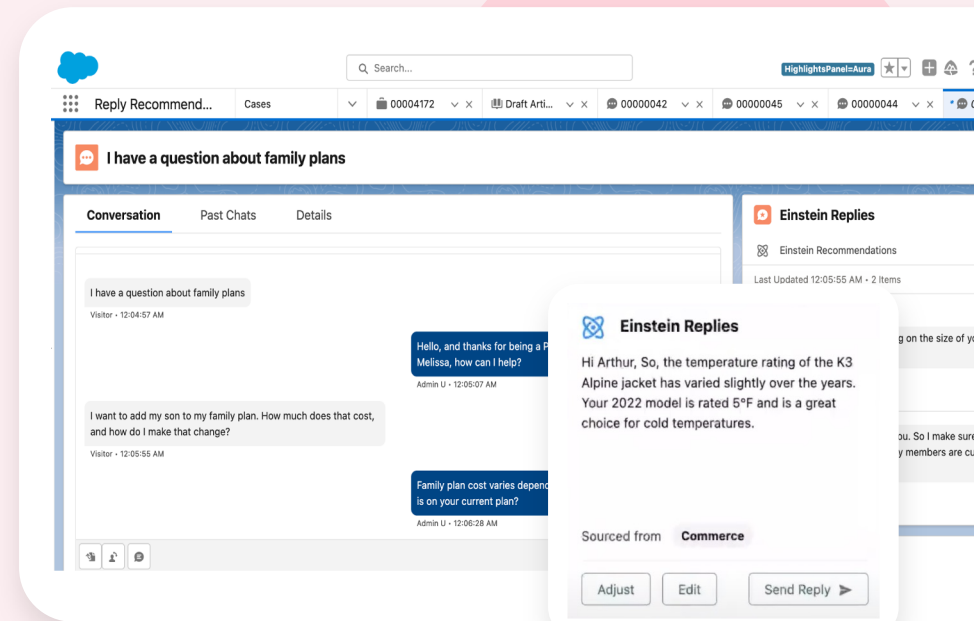
Search answers

Pilot July '23



Mobile work briefings

Pilot July '23



+30% case resolution increase with AI



From Idea to Application in ~80 Minutes:

Hawaii Marine Animal Response
(HMAR) Sighting & Reporting App



Hawaii Marine Animal Response (HMAR) Sighting & Reporting App



The Goal

Enable the users to report marine wildlife sightings easily, efficiently and accurately. Present information to HMAR volunteers in a meaningful way.

Key Points

- Easy to find and use reporting method
- Beach impact on call quality/hotline
- Increase information accuracy
- Relate/correlate multiple reports for single animal sightings
- Public currently calls hotline to report sightings



Two User Personas



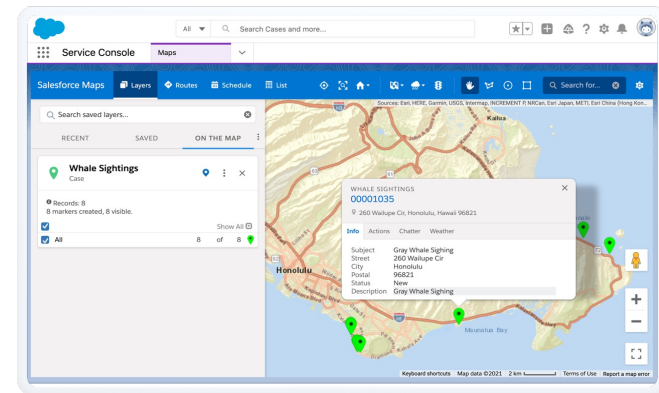
MOBILE WEB-RESPONSIVE PORTAL FOR REPORTING SIGHTNINGS

Public-Facing Web Portal



ENTERPRISE CASE MANAGEMENT APPLICATION/HOTLINE FOR H-MAR

HMAR Staff-Facing Business Application



<https://hahacc1demo-developer-edition.na163.force.com/HACC/s/>

Salesforce AppExchange

Extend Salesforce with the World's Leading Cloud Marketplace

Pre-built Apps and Solutions

Extend with 4,400+ apps, components, Flow solutions, and more built by partners and Salesforce Labs

Solutions Across Industries

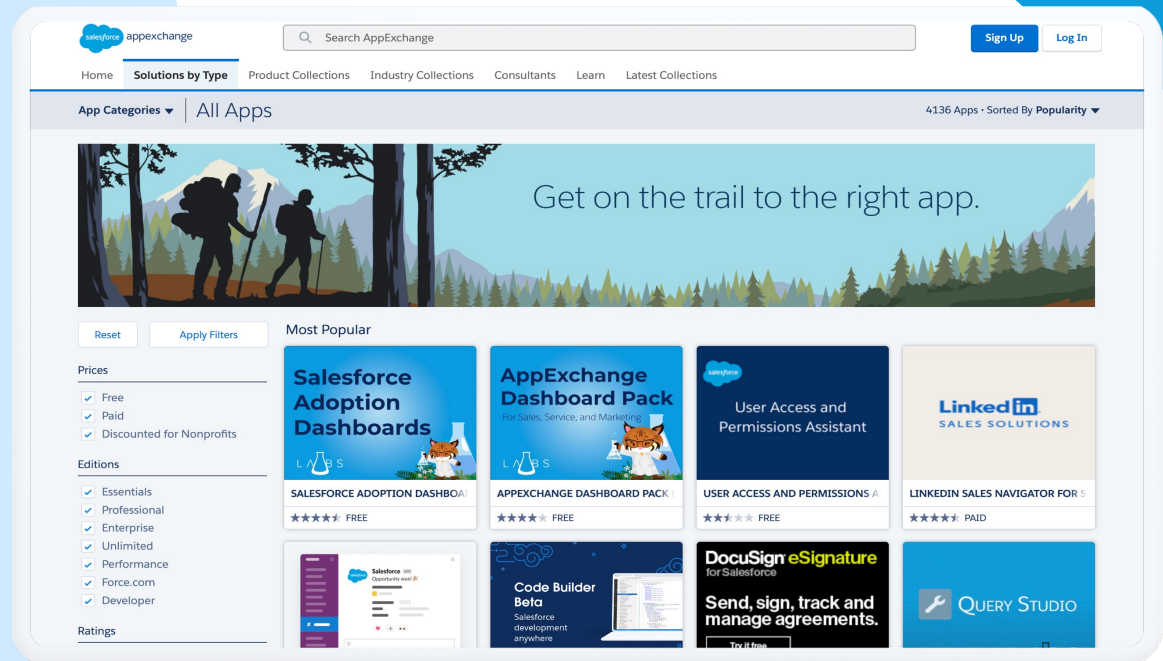
Respond to current business challenges for your customers, employees and communities

Intelligent Recommendations

Find solutions tailored to your needs on the "Recommended For You" page

Certified Expertise

Discover consultants with expertise for your business and industry needs



DocuSign®



Training Resources

Learn the Salesforce Platform. For Free.

Trailblazers, Together

/treyl-bley-zer/ noun

- (1) a pioneer; an innovator; a lifelong learner; a mover and shaker.
- (2) a leader who leaves a path for others to follow.
- (3) most importantly, a person who builds a better world for others.

20M

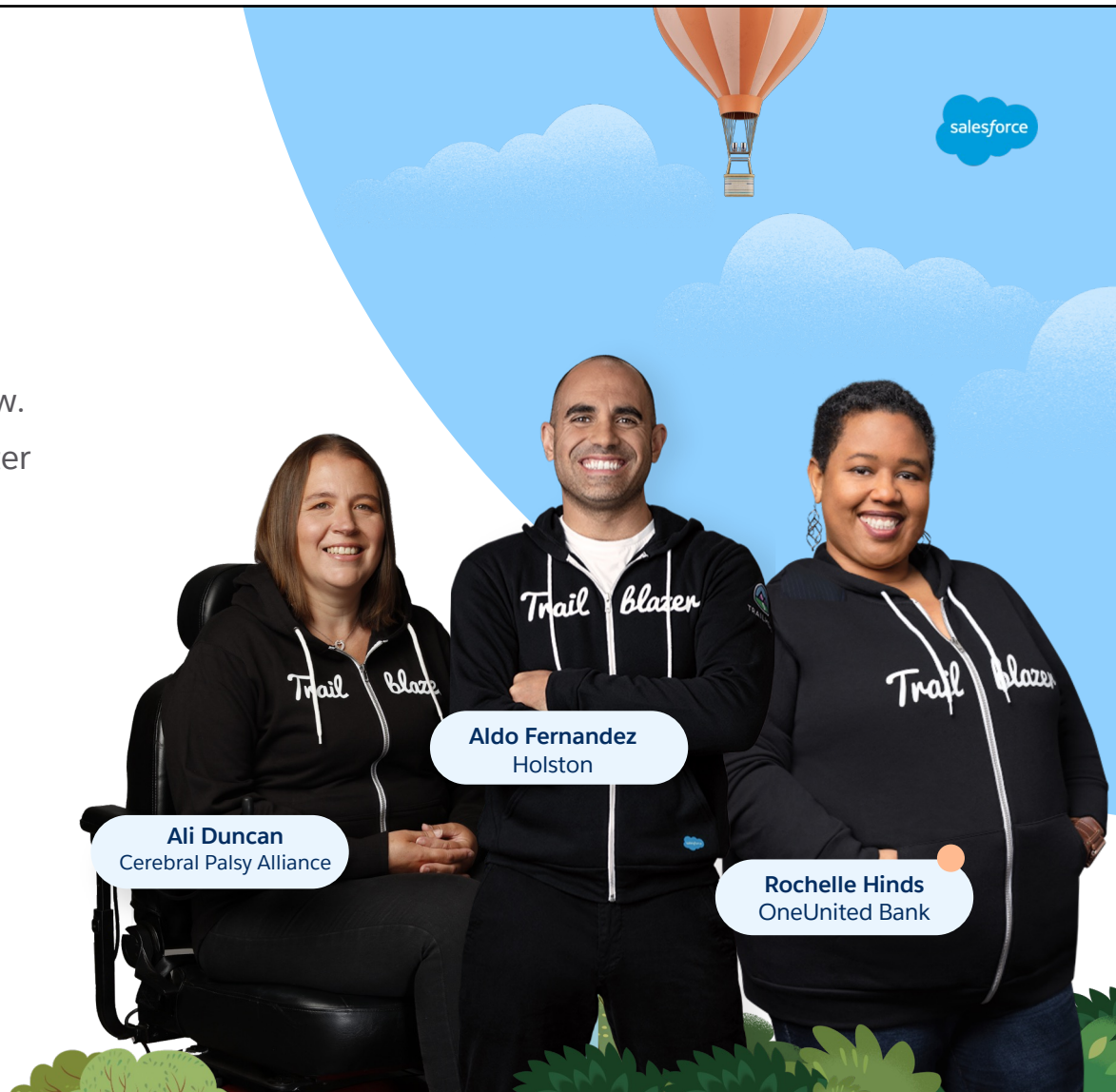
Trailblazers

2100+

Community Groups

100+

Countries



Ali Duncan
Cerebral Palsy Alliance

Aldo Fernandez
Holston

Rochelle Hinds
OneUnited Bank

Learn Salesforce with Trailhead. For Free.

Build Skills & Get Certified

Comprehensive Learning Platform

Free, gamified learning platform that empowers anyone to skill up for the future

Companion Mobile App: Trailhead Go

Learn marketable skills from anywhere on the Trailhead GO mobile app

Trailhead LIVE

Reinvented classroom experience with live-streamed expert-led classes on today's most in-demand skills

Earn Resume-worthy Skills and Credentials

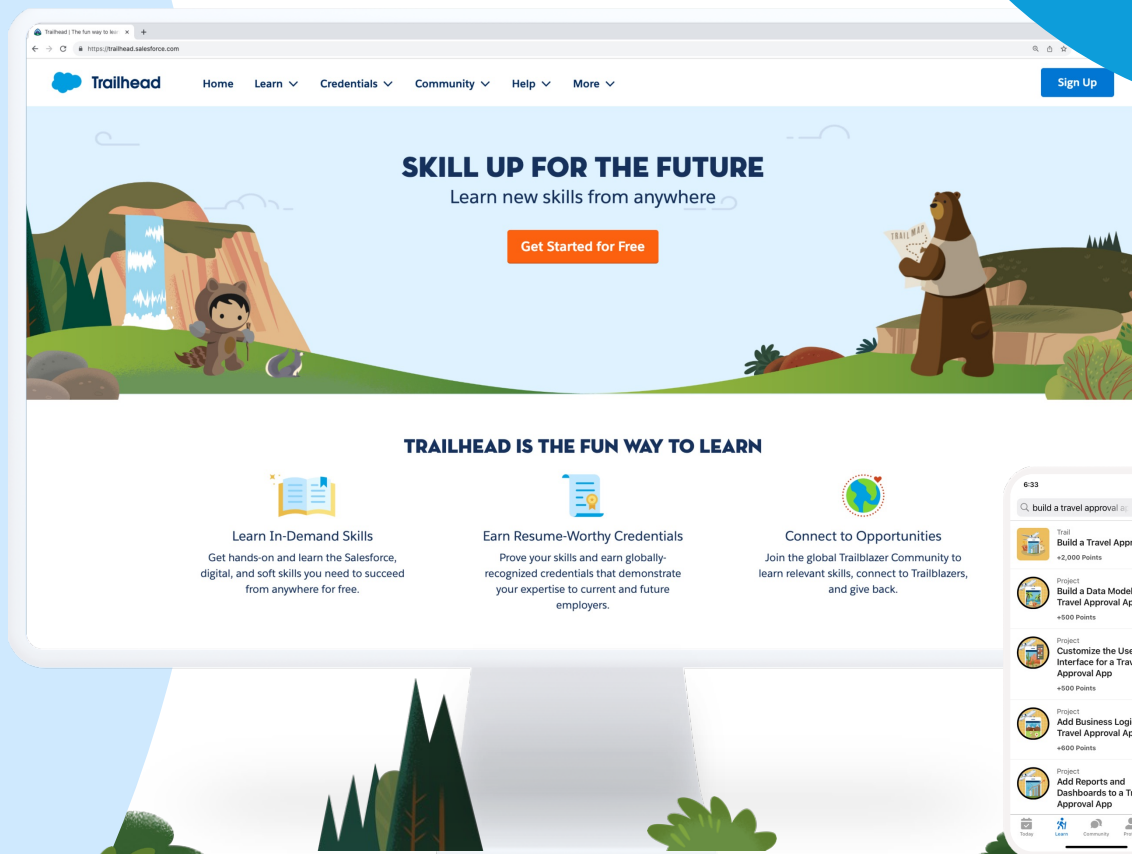
Build and practice the in-demand skills that your company needs to go digital fast



Build a Travel Approval App

<http://sfdc.co/TravelApp>

<http://www.trailhead.com>



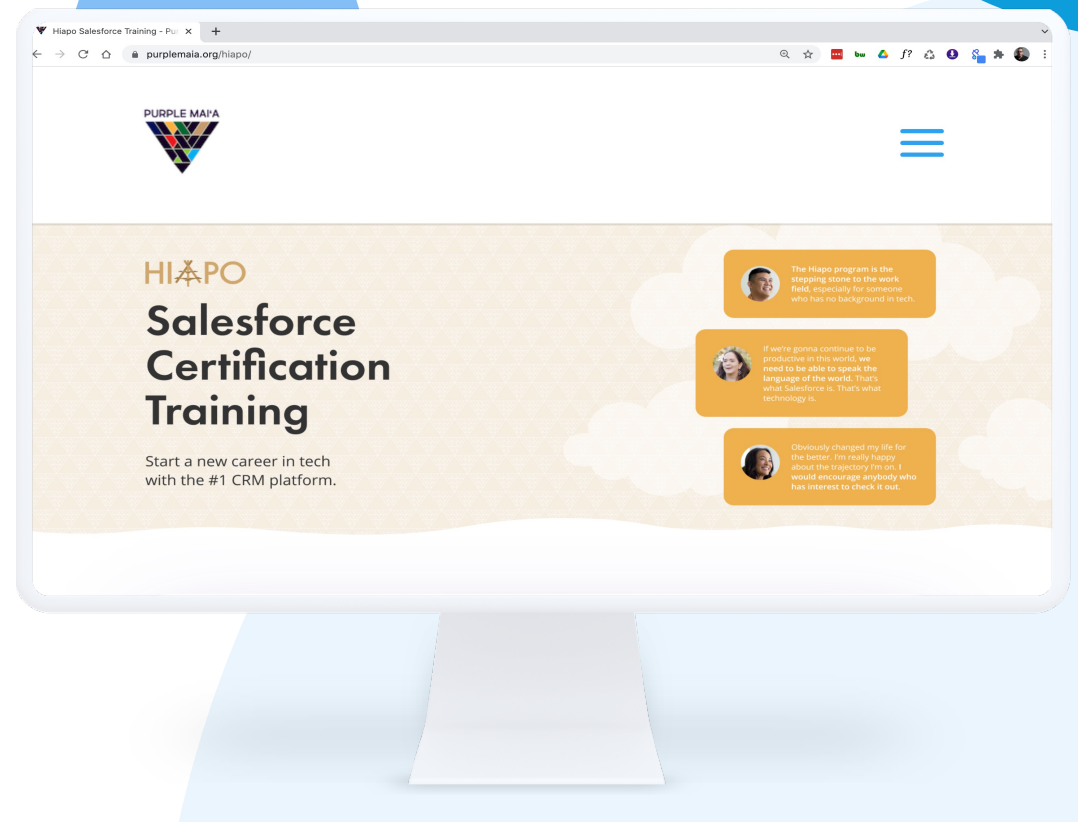
Purple Mai'a

Salesforce Certification Training

PURPLE MAI'A



<https://purplemaia.org/hiapo/>





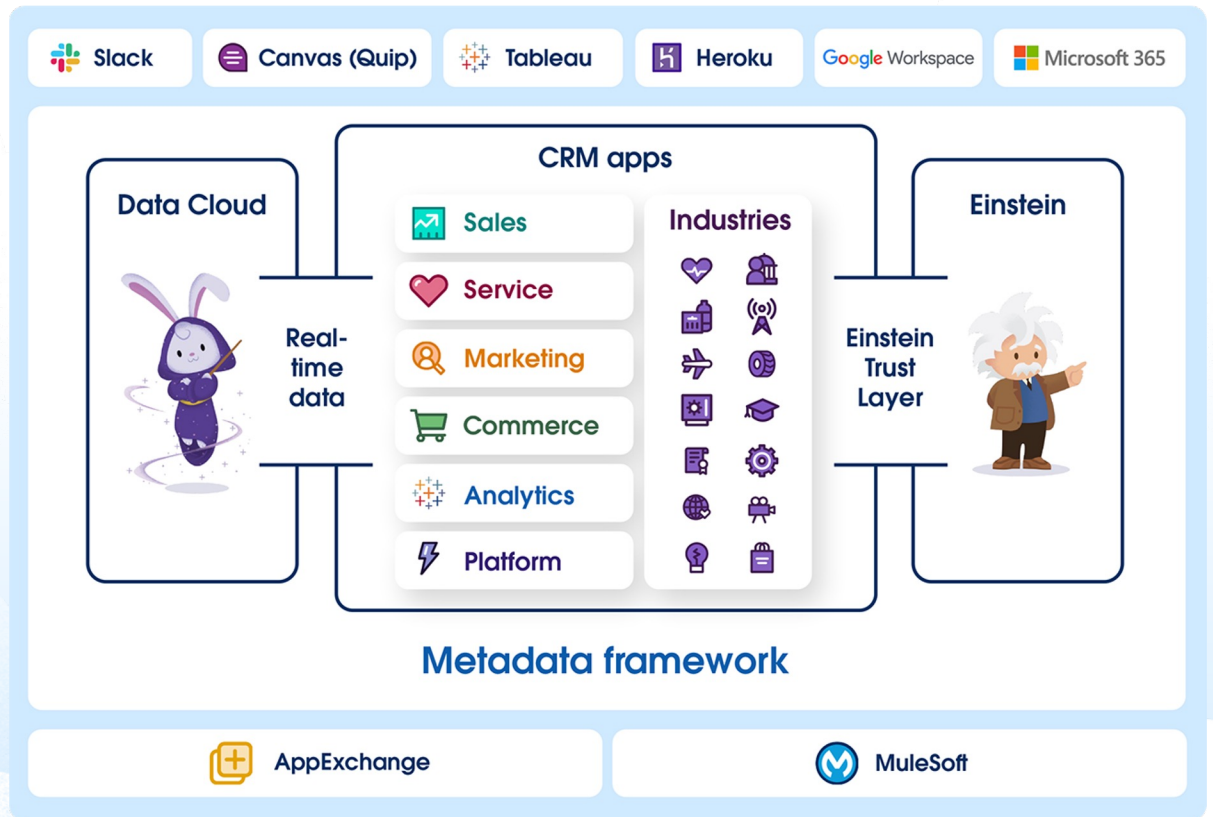
Extras



Einstein 1 Platform

The Trusted AI Platform for Customer Companies

- Integrated
- Intelligent
- Automated
- Low code & no code
- Open



ENGAGEMENT CHANNELS

- Web Browser
- Einstein Bots
- Live Chat/SMS
- Phone
- Email / Mail
- In Person
- Mobile App

PUBLIC SECTOR SOLUTIONS (PSS) PRE-BUILT APPLICATIONS

- Licensing, Permitting & Inspections
- Grantmaking
- Benefit Management
- Courts & Investigative Case Management
- Composable Case Management
- Emergency Program Management
- Employee Experience

PSS DATA MODELS

- Application & Authorization
- Benefit Management
- Composable Case Management
- Courts and Investigative Case
- Grantmaking
- Visits, Inspections & Dynamic Assessments
- Public Complaint
- Provider Management
- Regulatory, Fees & Enforcement

SALESFORCE INDUSTRIES COMMON COMPONENTS

- PARTY RELATIONSHIP GROUPS
- FOUNDATION DOCUMENT GENERATION
- DOCUMENT CHECKLIST ITEMS
- BUSINESS RULES ENGINE (BRE)
- OMNI STUDIO FLEX CARDS
- RECORD ALERTS
- SERVICE PROCESS STUDIO
- ACTIONABLE RELATIONSHIP CENTER
- INTELLIGENT DOCUMENT AUTOMATION
- OMNI SCRIPT GUIDED PROCESSES
- DECISION EXPLAINER
- TIMELINE
- INTERACTION SUMMARIES
- OMNI STUDIO DATA RAPTORS
- HIERARCHICAL VIEW
- INTELLIGENT DOCUMENT READER (OCR)
- OMNI STUDIO DYNAMIC ASSESSMENTS
- DECISION TABLES
- LIFE EVENTS & MILESTONES
- ACTION LAUNCHER
- OMNI STUDIO INTEGRATION PROCEDURES

Sales Cloud
 Service Cloud
 Marketing Cloud
 Commerce Cloud
 Tableau
 MuleSoft
 Slack
 Industries

PLATFORM CORE SERVICES & FEDRAMP CERTIFIED GOV-CLOUD INFRASTRUCTURE

SSO/IDENTITY MANAGEMENT	ROLE BASED SECURITY	FIELD AUDIT TRAIL	PLATFORM ENCRYPTION	EVENT MONITORING	FLOW BUILDER	APPROVALS ENGINE	ASSIGNMENT RULES	OMNI-CHANNEL ROUTING
OPEN APIS	SALESFORCE DX	SCHEMA BUILDER	EINSTEIN SEARCH	DUPLICATE & MATCH RULES	ALERTS & NOTIFICATIONS	REPORTS & DASHBOARDS	CHATTER COLLABORATION	EINSTEIN BOTS
GIS & MAP SERVICES	KNOWLEDGE MANAGEMENT	CONTENT MGT. SYSTEM	SALESFORCE SCHEDULER	TASK MANAGEMENT	FILE MANAGEMENT	SMS MESSAGING	LIVE AGENT CHAT	MOBILE APPS
GLOBAL DATA CENTERS	MULTITENANT DATABASE	METADATA ARCHITECTURE	DATABASE BACKUP	DATABASE FAILOVER	CONTINUOUS SITE SWITCHING	REDUNDANT NETWORKS	FIRE DETECTION & SUPPRESSION	INTRUSION DETECTION