
Customer 360 Guide for Consumer Goods

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CUSTOMER 360 GUIDE FOR CONSUMER GOODS

Integrate your route to market by planning, executing, and servicing B2B customers to drive business growth.

The assets in this Customer 360 Guide help consumer goods companies build a vision and make a plan for digital transformation. [Learn with Trailhead](#)

Architectural diagrams and business scenarios show you how Salesforce products combine with industry best practices to expand your business capabilities. Solution Kits show you how to implement Salesforce-recommended cross-cloud solutions to common retail use cases.

[Industry Blueprint for Consumer Goods](#)

Examine the Salesforce view of strategy, product innovation, and partner relationships to enable B2B and B2C business processes on an integrated platform in the consumer goods industry.

[Reference Architecture for Consumer Goods](#)

Map specific Salesforce products to the functional capabilities and operational activities of consumer goods organizations.

[Business Scenarios for Consumer Goods](#)

Business scenarios help you bridge the gap between your organization's business capabilities and the solutions needed to achieve your goals. For each scenario, discover a variety of Salesforce solutions that reduce your time to value and allow you to define a roadmap to build out your organization's functionality.

[Solution Architecture for Consumer Goods](#)

Identify the specific tools and resources that can help you deliver comprehensive automation solutions for your consumer goods business.

[Explore Solution Kits for Consumer Goods](#)

Enhance your cross-cloud business by implementing one or more solution kits. Get product recommendations, workflow details, and instructions to help you implement the solution from start to finish.

SEE ALSO:

[Customer 360 Guide for Retail Banking Learning Map](#)

[Customer 360 Guide for Discrete Manufacturing Learning Map](#)

[Customer 360 Guide for Retail Learning Map](#)

[Customer 360 Guides: Quick Look](#)

Industry Blueprint for Consumer Goods

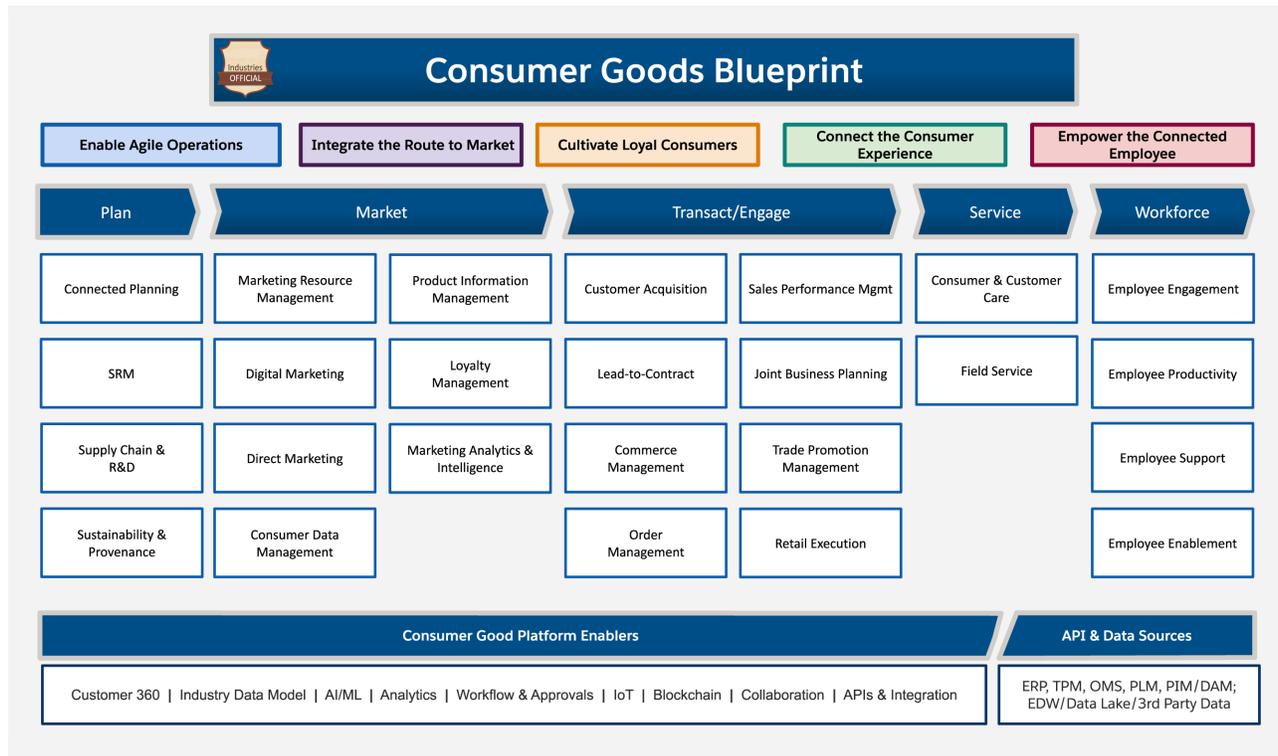
Examine the Salesforce view of strategy, product innovation, and partner relationships to enable B2B and B2C business processes on an integrated platform in the consumer goods industry.

The industry blueprint describes the end-to-end consumer goods customer lifecycle. Use the industry blueprint to understand how Salesforce Customer 360 platform capabilities help structure, organize, and support digital transformation.

- Map customer-facing business capabilities that are common to consumer goods stages of the customer lifecycle across planning, marketing, transacting, servicing, and the workforce experience.
- Determine which capabilities are most important to your organization, and prioritize implementation accordingly.

- Organize projects that deliver business value with maximum benefit.
- Gain alignment among key business process stakeholders.
- Understand the high-level platform capabilities and the Salesforce partners that power your organization’s business needs.

Contact your Salesforce account team or a Salesforce partner for help with assessing the business and platform capabilities most suited for your organization.



The typical lifecycle of a consumer goods customer relationship has five process groups. Each major process group contains a number of business processes that together fulfill a business need or industry imperative.

- **Enable Agile Operations:** Optimize the value chain. Grow and protect the brand through real-time collaboration across functional boundaries. Proactively use data while building a sustainable business.
- **Integrate the Route to Market:** Become the brand of choice by letting account and field teams plan and execute. Drive sales growth through data-driven insights. Integrate all B2B sales channels. Gain a single source of truth with key account management, field execution, customer service, and channel partner incentives on the Salesforce platform.
- **Cultivate Loyal Consumers:** Make each consumer digital interaction with your company easy, connected, and personalized. Drive the right data strategy to simplify experiential, personalized, and consistent engagement. Turn individuals into loyal and repeat consumers, no matter where they engage.
- **Connect the Consumer Experience:** Deliver an Omni-Channel shopper experience that adapts to the rapidly changing paths to purchase. Let the shopper select, find, and buy products that are relevant, desired, and aligned to their values.
- **Empower the Connected Employee:** Equip employees with digital tools that enhance productivity and drive growth with your customers. Digitize your HQ and field operations through connected systems and collaboration.

Salesforce partners with independent software vendors (ISVs) and consultants to extend platform capabilities that suit business processes. Other industry-specific integrations and complete solutions are important in a typical business context. To learn more about ready-to-install applications, solutions, or consultants, check out AppExchange.

 **Note:** To understand which business capabilities, solutions, and Salesforce products can help your organization achieve the business needs identified on the blueprint, review the [Business Scenarios for Consumer Goods](#) on page 6.

Platform Enablers, API, and Data Sources are common across all lifecycle stages and business processes. Use platform enablers, APIs, and data sources as a baseline of functionality to support tailored solutions.

 **Note:** To understand how industry and business requirements link to the underlying technologies that support them, review the [Reference Architecture for Consumer Goods](#) on page 3. Use the industry blueprint as a framework for creating a reference architecture for planning customer experience enhancements.

SEE ALSO:

[Industry Blueprints for Partners](#)

[Reference Architecture for Consumer Goods](#)

[Solution Architecture for Consumer Goods](#)

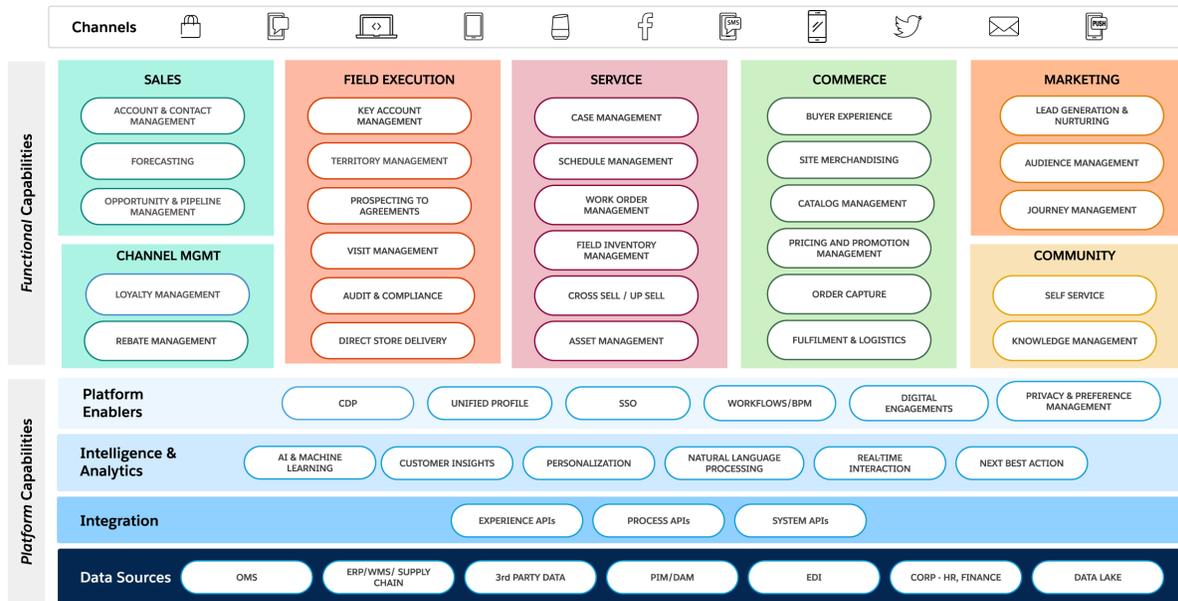
[Salesforce Architectural Diagrams: Quick Look](#)

Reference Architecture for Consumer Goods

Map specific Salesforce products to the functional capabilities and operational activities of consumer goods organizations.

Salesforce provides configurable product solutions that support a consumer goods company's ability to effectively engage their customers and partners. The reference architecture helps communicate the vision and strategy of a solution to business executives and stakeholders. [Learn with Trailhead.](#)

Our reference architecture presents Functional and Platform capabilities. Each layer contains a representative subset of systems or capabilities that are most relevant for consumer goods organizations. It doesn't list all possible systems or capabilities.



Platform Capabilities

These components form the underlying technology base for achieving your goals. Each layer in the platform builds on top of the next. B2B systems typically rely on these elements.

Capability	Description
Data Sources	Data sources are systems that create, collect, and manage various types of data. These systems can act as systems of record. They're often purpose-built to handle particular functionality and data requirements, but some provide general system needs.
Integrations	Integrations include tools and routes that connect systems of record with each other or with higher-level experiences. Integrations can include varied tools like APIs that connect separate systems, single sign-on services to manage customer identity across different systems, and customer data platforms that segment customers.
Intelligence	Smart automation like machine learning and AI helps you optimize your use of customer data. To enhance your customer relationships and drive sales, the intelligence layer serves functions like delivering actionable customer insights, personalized product recommendations, and improving real-time customer interactions.
Analytics	Analytics helps you better understand your data and make smart business decisions. <ul style="list-style-type: none"> • Descriptive analytics summarize existing data to help you better understand the current state or past activities. Descriptive analytics typically answer "What?" questions about your data. • Diagnostic analytics use the output of descriptive analytics to identify patterns and outlier data. Diagnostic analytics typically answer "Why?" questions about your data. • Predictive analytics use historical data to anticipate future outcomes, such as the likelihood that a subscriber opens an email.

Capability	Description
	<ul style="list-style-type: none"> Prescriptive analytics suggest courses of action based on your existing data. Prescriptive analytics typically answer “Should?” questions about your future actions.
Platform Enablers	Use common capabilities that drive the business processes across the enterprise. Build a unified profile using a customer data platform. Drive workflows and engagement based on that unified profile.

Functional Capabilities

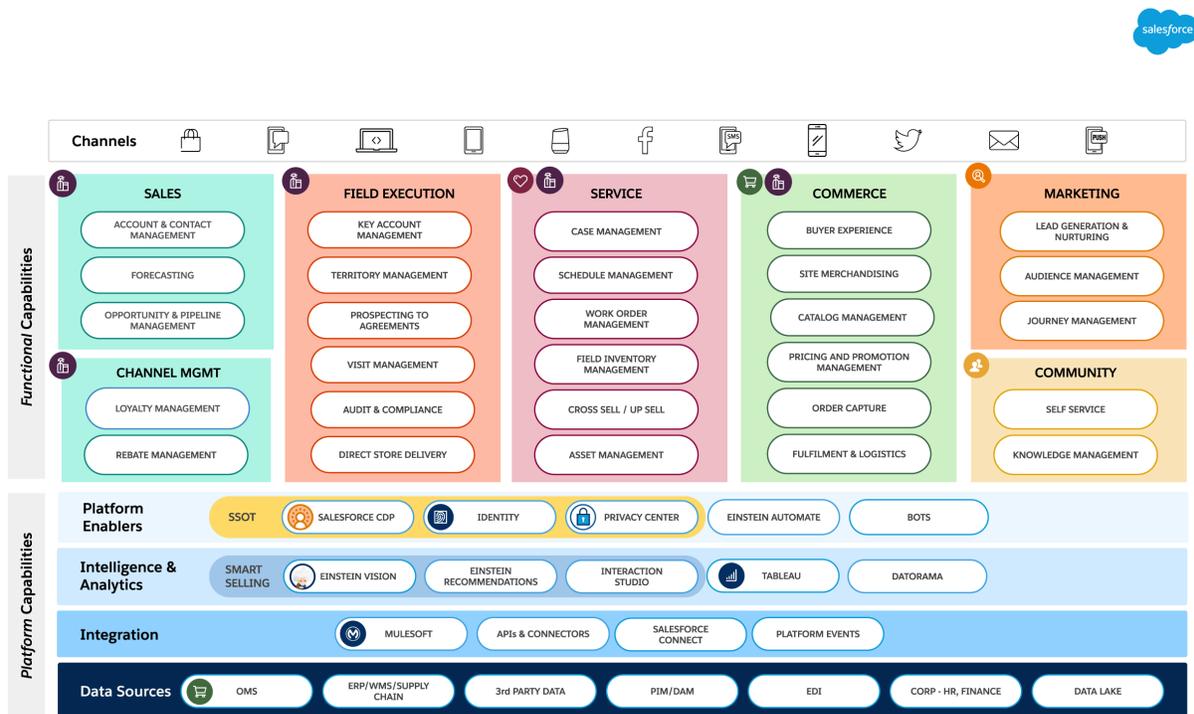
Business-specific elements at the functional capabilities level are connected more directly to the customer’s experience and measured in terms of maturity. Successful implementation of functional capabilities depends heavily on implementation of the platform capabilities.

The consumer goods industry is evolving to handle disruption and change. The traditional integrated route to markets focused the B2B business model on key account management and field retail execution via sales channels. The industry is now starting to engage end-consumers directly via B2C Commerce and self-service models in partner systems. The recent evolution of privacy is also driving marketing changes to understand consumer behavior more directly by gathering more first-party data.

To identify strategic goals around which to focus your implementation, review common B2C [Business Scenarios for Retail](#) and their included functional capabilities.

A Business Capability Maturity Assessment arranged by your Success Manager or Account Executive can help you determine which areas of your business can benefit from more focus.

Mapping Platform Capabilities to Salesforce



Specific Salesforce products handle each of the needs identified at the platform capability level.

Identify gaps in your underlying capabilities by customizing this model to include other Salesforce products or third-party systems in your current technology stack.

To explore the reference architecture specific to your business, contact your Success Manager or Account Team.

[Business Scenarios for Consumer Goods](#) on page 6 help you better understand your business capabilities and find solutions that support your business goals.

Learn more about Salesforce products in this industry.

- [Consumer Goods Cloud](#)
- [CPQ](#)
- [Mulesoft](#)
- [Commerce](#)
- [Experience Cloud](#)
- [Service](#)
- [Field Service](#)
- [Sales](#)
- [Analytics](#)
- [Work.com](#)
- [Marketing](#)

SEE ALSO:

[Salesforce Architectural Diagrams: Quick Look](#)

[Industry Blueprint for Consumer Goods](#)

[Solution Architecture for Consumer Goods](#)

[Business Scenarios for Consumer Goods](#)

Business Scenarios for Consumer Goods

Business scenarios help you bridge the gap between your organization's business capabilities and the solutions needed to achieve your goals. For each scenario, discover a variety of Salesforce solutions that reduce your time to value and allow you to define a roadmap to build out your organization's functionality.

Successful execution of core functions requires an organization to have certain expertise, or business capabilities. Understanding what business capabilities are needed to achieve this scenario helps cross-functional teams in your organization align and better strategize around technology solutions.

Get the Most Out of Best Practices

Following best practices, and selecting the right solutions and products for your organization are key to a successful implementation of business scenarios. Follow these steps to make use of business scenarios.

- Review business capabilities required to achieve this business scenario.
- Assess the maturity levels of your organization's business capabilities.
- Review the best practices with minimum maturity level to understand how your business can improve in each area of capability.

- Review products and solutions to get quick time to value and build a roadmap as you increase your maturity.

To arrange a Business Capability Maturity Assessment, contact your Success Manager or Account Executive.

Explore Retail Banking Business Scenarios

[Manage Key Accounts](#)

Accelerate digital alignment to fuel growth for consumer goods companies. Transform how you manage accounts to support joint go-to-market success between consumer goods brands and channel partners such as distributors, wholesalers, and retailers.

[Optimize Field Execution](#)

Empower your consumer goods products field reps to get the most out of every outlet. Mobile devices help reps manage lead-to-order and perfect execution while enabling them to be more consultative throughout the selling process.

[Transform B2B Commerce](#)

Provide consumer goods channel partners seamless, collaborative experiences by delivering a consumer-grade digital B2B commerce experience.

[Incentivize Channel Partners](#)

Offer enhanced experiences to consumer goods partners to improve indirect sales performance, influence partners' behavior, and build B2B loyalty.

SEE ALSO:

[Manage Key Accounts](#)

[Optimize Field Execution](#)

[Transform B2B Commerce](#)

[Incentivize Channel Partner](#)

Manage Key Accounts

Accelerate digital alignment to fuel growth for consumer goods companies. Transform how you manage accounts to support joint go-to-market success between consumer goods brands and channel partners such as distributors, wholesalers, and retailers.

What was once a cumbersome manual process often managed with many spreadsheets, account management can now be streamlined to produce better, more efficient outcomes. Using analytics customized for the consumer goods industry, account managers can work with customers and their category buyers to enable more savvy business decisions and effective negotiation tactics. Companies and their channel partners also have access to powerful tools that can turbocharge visibility, collaboration, and productivity.

Managing key accounts allows brands to:

- Design smarter territories that positively impact sales performance and revenue growth.
- Unlock account collaboration to increase productivity with shared tools.
- Engage in joint business planning, integrating channel planning and budgeting.
- Optimize trade promotions to achieve a 360-degree view of spend and return on investment (ROI).
- Forecast customer demand to gain complete commercial visibility and drive transparency and profitability within accounts.

Key Performance Indicators (KPIs)

Understand success in this area with these four KPIs.

- Growth: Nurture growth on metrics such as sales volume, revenue, and margins. Metrics can be based on a region, account, or product category mix.
- Revenue: Reach a sales volume figure in your accounts. In cases where there's a universal unit of measure across multiple categories, revenue can also be measured by volume.
- Margin: Deliver the growth and revenue targets in accordance with a certain margin goal.
- Trade Spend: Trade spend budgets are fixed or derived from a live rate percentage of revenue available to reach targets for the year to date.

To find the best ways to measure the success of your key account management, review [Calculate Key Performance Indicators](#).

Products

These products can help you manage your key accounts.

- [Consumer Goods Cloud](#), including Salesforce Maps
- Key Account Management Add-on
- [Accenture Trade Promotion Management](#)
- [Enterprise Territory Management](#)
- [CRM Analytics for Consumer Goods](#)
- [Marketing C](#)
- [CPQ](#)
- [Chatter](#)
- [Quip](#)
- [Experience Cloud](#)

Solutions

Salesforce recommended solutions are linked to business capabilities. To help you find solutions that your business is ready for right now, we divide resources into three levels depending on complexity. Choose from solutions that you can implement immediately, and put together a roadmap to build out more mature capabilities over time. For more information about solutions, contact your Success Manager or Account Executive.

Business Capabilities

For each capability, whether it's undeveloped or industry-leading, we provide implementation information, metrics to evaluate success, and recommended solutions. View additional details to learn about maturity levels and best practices for these capabilities.

Table 1: Business Capabilities for Managing Key Accounts

Capability	success metrics	recommended solutions
<p>Territory Management Approach</p> <p>Assign sellers to accounts, and ensure that standard objects have a master-detail relationship with accounts. Create necessary sharing records, and provide a roll-up mechanism for reporting and forecasting. Learn More on page 13</p>	<ul style="list-style-type: none"> • Increased number customers per rep • Increased productivity based on amount of sales per rep 	<p>Beginning</p> <ul style="list-style-type: none"> • Sales Maps Configuration Get started with Salesforce Maps • Territory Management Basics

Capability	success metrics	recommended solutions
		<p>Intermediate</p> <ul style="list-style-type: none"> • Enterprise Territory Management Define the area that your reps are responsible for targeting • Salesforce Maps Territory Planning Analyze and design your sales territories
<p>Account and Contact Management Approach</p> <p>Establish roles and responsibilities. Create, augment, govern, and manage accounts. Learn More on page 13</p>	<ul style="list-style-type: none"> • Increased pipeline volume • Increased opportunity volume • Decreased time at stage 	<p>Beginning</p> <ul style="list-style-type: none"> • Consumer Goods Cloud Data Model Get to know the consumer goods data model • Accounts and Contacts in Retail Execution • Sales Cloud: Considerations for Accounts and Contacts (Accelerator) • Deploy and Use Analytics for Consumer Goods Get insights on your territory, stores, and sales rep performance with Analytics
<p>Account Planning</p> <p>Foster team selling, increase customer satisfaction, and decrease customer turnover using a living account plan and business reviews. Learn More on page 13</p>	<ul style="list-style-type: none"> • Increased opportunity volume • Reduced customer attrition 	<p>Beginning</p> <ul style="list-style-type: none"> • Deploy and Use Analytics for Consumer Goods Get insights on your territory, stores, and sales rep performance with Analytics • Sales Team Collaboration Use Salesforce Collaboration Tools to sell as a team • Quip Use Quip to sell as a team • Get Started with Sales Agreements Track target metrics for retail, HoReCa, and professional channels

Capability	success metrics	recommended solutions
		<p>Intermediate</p> <ul style="list-style-type: none"> • Calculate Key Performance Indicators Learn the definitions and calculations of key metrics shown in CRM Analytics for Consumer Goods Dashboards • Explore Einstein Object Detection and CRM Analytics Analytics Improve in-store checks and maximize efficiency • Collaborate with Quip Learn how your team can work better together with Quip • Use Prebuilt Assets from Mulesoft (AppExchange)
<p>Sales Forecasting Approach</p> <p>Understand the concepts and methods necessary for successful forecasting. Learn More on page 13</p>	<ul style="list-style-type: none"> • Increased pipeline funnel health • Increased sales productivity • Decreased seller administration time • Improved forecast accuracy • Increased quota attainment • Increased sales revenue 	<p>Beginning</p> <ul style="list-style-type: none"> • Leads & Opportunities for Lightning Experience • Sales Accounts and Forecasting • Get the Most out of Forecasting (Accelerator) <p>Intermediate</p> <ul style="list-style-type: none"> • How to use Einstein Prediction Builder for Opportunity Scoring • How to use Einstein Prediction Builder to Predict Opportunity Amounts • Territory Based Forecasting (video) Manage your reps more effectively across territories • Territory Forecasts <p>Advanced</p> <ul style="list-style-type: none"> • Einstein Opportunity Scoring
<p>Opportunity and Pipeline Management Approach</p> <p>Create opportunity stages, define entry and exit criteria to move from stage to stage, and use a sales coaching process to help</p>	<ul style="list-style-type: none"> • Increased pipeline volume • Accelerated sales cycle • Reduced time at each opportunity stage • Increased win rate 	<p>Beginning</p> <ul style="list-style-type: none"> • Collaborate with Quip • Build Great APIs and Integrations with Mulesoft

Capability	success metrics	recommended solutions
sellers effectively move opportunities through the pipeline. Learn More on page 13		
<p>Lead Generation</p> <p>Attract prospective customers to engage with your brand. Capture prospective customers as prospects or leads. Learn More on page 13</p>	<ul style="list-style-type: none"> • Increased number of leads or prospects • Increased number of new customers 	<p>Beginning</p> <ul style="list-style-type: none"> • Sales Cloud: Manage Leads (Accelerator) Learn about effective lead management • Generate Leads from Your Website for Your Sales Teams • Get to Know Marketing Cloud <p>Intermediate</p> <ul style="list-style-type: none"> • Salesforce & Account Engagement Integration Align Marketing and Sales Teams with Account Engagement Integration • Generate Leads with Account Engagement Landing Pages and Forms • B2B Marketing Analytics Basics • Account Engagement: B2B Marketing Analytics <p>Advanced</p> <ul style="list-style-type: none"> • Use Account Engagement with Salesforce Streamline your sales and marketing efforts into one platform • Take on B2B and B2C Marketing with Account Engagement and Journey Builder(Solution Kit)
<p>Quote Management</p> <p>Create, send, and store quotes. Learn More on page 13</p>	<ul style="list-style-type: none"> • Accelerated sales cycle • Reduced number of discounts given 	<p>Beginning</p> <ul style="list-style-type: none"> • Configure Price Books, Templates, and Contracts <p>Intermediate</p> <ul style="list-style-type: none"> • Get Started with CPQ(Accelerator) • Get Started with Guided Selling (Accelerator)

Capability	success metrics	recommended solutions
		<ul style="list-style-type: none"> • Create and Manage an Optimized Product Catalog (Accelerator) • Best Practices for Price Rules <p>Provide a seamless reorder experience using the negotiated Sales Agreement object in Manufacturing</p>
<p>System Integration</p> <p>Support planning by giving employees and customers the same view of sell-in and sell-out data, promotion/planogram compliance, stock outs, and trend analysis for volume planning. Learn More on page 13</p>	<ul style="list-style-type: none"> • Increased revenue and profit from an enhanced supply chain • Reduced costs on manual alignment, reporting of data, and systems • Improved forecast accuracy 	<p>Beginning</p> <ul style="list-style-type: none"> • Get Started with Sales Agreements <p>Track target metrics for retail, HoReCa, and professional channels</p> <p>Intermediate</p> <ul style="list-style-type: none"> • Build Great APIs and Integrations with Mulesoft • Use Prebuilt Assets from Mulesoft
<p>Data Visualization</p> <p>Use visual elements to better express the significance of data. Learn More on page 13</p>	<ul style="list-style-type: none"> • Increased number of sales per sales rep 	<p>Beginning</p> <ul style="list-style-type: none"> • Explore with CRM Analytics <p>Intermediate</p> <ul style="list-style-type: none"> • Success with Einstein Analytics • Deploy and Use Analytics for Consumer Goods <p>Use KPIs and data visibility for accountability</p>
<p>Customer Communities</p> <p>Create and maintain communities in which you can collaborate with your customers on a unified platform to create customer-specific sales agreements and joint business plans. Learn More on page 13</p>	<ul style="list-style-type: none"> • Increased revenue and profit from enhanced supply chain • Reduced costs on manual alignment, reporting of data, and systems • Improved forecast accuracy 	<p>Beginning</p> <ul style="list-style-type: none"> • Improve Partner Collaboration with Experience Cloud • Community Cloud: Plan Your Chatter Adoption (Accelerator)

Business Capabilities for Manage Key Accounts

Get a detailed view of maturity levels, best practices, and recommended solutions for enhancing sales capabilities for consumer goods organizations.

Business Capabilities for Manage Key Accounts

Get a detailed view of maturity levels, best practices, and recommended solutions for enhancing sales capabilities for consumer goods organizations.

Use maturity levels to determine your organization's progress in each capability area. Implementing best practices and recommended solutions improve maturity in each area.

These capabilities represent the most critical capabilities in this business area.

- Territory Management Approach
- Account and Contact Management Approach
- Account Planning
- Sales Forecasting Approach
- Opportunity and Pipeline Management
- Lead Generation
- Quote Management
- System Integration
- Data Visualization
- Customer Communities

Territory Management Approach

Assign sellers to accounts, and ensure that standard objects have a master-detail relationship with accounts. Create necessary sharing records, and provide a roll-up mechanism for reporting and forecasting.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing Reporting and forecasting needs are met using Territory Management, but the setup and design of territories in the CRM doesn't support the company's go-to-market strategy.</p> <p>Recommended Level: Optimized Territory management setup supports the go-to-market strategy. The process to make updates is cumbersome and time-consuming, and delays are common.</p>	<ul style="list-style-type: none"> • Invest time in crafting a balanced territory management strategy. • Specify which sellers sell what products to which customers. • Establish confidence that the territories are balanced and that each seller has sufficient and equal opportunity to reach their goal. • Collaborate and communicate transparently to align with the rest of the organization on business impact. • Establish a consistent territory management process based on the company's go-to-market strategy. • Establish an account segmentation approach. • Define and document territory policies and exceptions. • Establish a data-centric territory management process with workflows 	<p>Beginning</p> <ul style="list-style-type: none"> • Sales Maps Configuration Get started with Salesforce Maps • Territory Management Basics <p>Intermediate</p> <ul style="list-style-type: none"> • Enterprise Territory Management Define the area that your reps are responsible for targeting • Salesforce Maps Territory Planning Analyze and design your sales territories

maturity levels	best practices	recommended solutions
	<p>that allow for flexibility and automation. Make data-driven decisions to establish and optimize territories.</p>	

Account and Contact Management Approach

Establish roles and responsibilities. Create, augment, govern, and manage accounts.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing Detailed account profiles provide a holistic view of the customer, such as bookings, account relationships, segment, tier, news, and more.</p> <p>Recommended Level: Optimized A 360-degree view of the customer exists in a CRM system, including links to other applications and systems with account information.</p>	<ul style="list-style-type: none"> • To ensure effective account and contact management, foster the right culture. • Align on the roles within the account and contact management process, and assign specific resources to those roles. • Align on expectations by role for the account and contact management process. • To encourage collaboration, create account teams. • Establish a consistent account and contact management approach. • Define a process to create an account. Align on the criteria for an account profile and what fields must be populated during creation. • To relate accounts to each other, create an account hierarchy. • Set up a data governance team that owns and maintains account ownership and rights to creation, editing, and deletion. • Determine a modern data management (MDM) strategy for accounts and whether to maintain accounts in Salesforce or an outside database. • To measure the success of account and contact management, align on the leading and lagging indicators. • Set up the reports and dashboards required to run the business as it relates to account and contact management 	<p>Beginning</p> <ul style="list-style-type: none"> • Consumer Goods Cloud Data Model Get to know the consumer goods data model • Accounts and Contacts in Retail Execution • Sales Cloud: Considerations for Accounts and Contacts Strategies for using account data to close deals • Deploy and Use Analytics for Consumer Goods Get insights on your territory, stores, and sales rep performance with Analytics

Account Planning

Foster team selling, increase customer satisfaction, and decrease customer turnover using a living account plan and business reviews.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing Account plans follow a standardized process in the CRM system, but they aren't automatically connected with the account record information.</p> <p>Recommended Level: Optimized Account plans are living, meaning that they're collaborative and linked with the account record, which drives goal-setting and knowledge-sharing.</p>	<ul style="list-style-type: none"> Establish a consistent account planning approach, including aligning on the benefits and cadence of account planning. Determine which components of an account plan template the internal team and the customer must populate. Craft an online user experience that allows the account plan to be collaborative and living. Ensure that account plans define value realization (renewal-driven) and net new business, and plan for specific actions to take throughout the year. 	<p>Beginning</p> <ul style="list-style-type: none"> Deploy and Use Analytics for Consumer Goods Get insights on your territory, stores, and sales rep performance with Analytics Sales Team Collaboration Use Salesforce Collaboration Tools to Sell as a Team Salesforce Anywhere for Customer 360 Use Salesforce Anywhere to sell as a team Get Started with Sales Agreements Track target metrics for retail, HoReCa, and professional channels <p>Intermediate</p> <ul style="list-style-type: none"> Calculate Key Performance Indicators Learn the definitions and calculations of key metrics shown in Einstein Analytics for Consumer Goods dashboards Explore Einstein Object Detection and CRM Analytics Improve in-store checks and maximize efficiency Collaborate with Quip Learn how your team can work better together with Quip Use Prebuilt Assets from Mulesoft(AppExchange)

Sales Forecasting Approach

Understand the concepts and methods necessary for successful forecasting.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing Forecasting is handled online using CRM data as the source of truth.</p> <p>Recommended Level: Optimized The organization views the forecasting process as an integral part of a larger cycle that runs from pipeline strategy and programs, opportunity management, and forecasting to management decision-making.</p>	<ul style="list-style-type: none"> To ensure effective forecasting, foster the right culture. Align on expectations by role. Understand the relationship between pipeline management and forecasting, and understand the purpose of forecasting as part of strategic business planning. Align on definitions of forecast categories. Align forecast categories with opportunity stages, and understand the value of subjectivity. Establish a consistent forecasting process based on the company's go-to-market strategy. Define a sale. Understand the behavior of commit and best case over time, and establish best coaching practices for subpar behaviors. Define your weekly snapshot and roll-up cadence. Establish a process for understanding and closing the commit vs. quota gap. 	<p>Beginning</p> <ul style="list-style-type: none"> Leads & Opportunities for Lightning Experience Sales Accounts and Forecasting Get the Most Out of Forecasting(Accelerator) <p>Intermediate</p> <ul style="list-style-type: none"> How to Use Einstein Prediction Builder for Opportunity Scoring How to Use Einstein Prediction Builder to Predict Opportunity Amounts Territory Based Forecasting(video) Manage your reps more effectively across territories Territory Forecasts <p>Advanced</p> <ul style="list-style-type: none"> Einstein Opportunity Scoring

Opportunity and Pipeline Management Approach

Create opportunity stages, define entry and exit criteria to move from stage to stage, and use a sales coaching process to help sellers effectively move opportunities through the pipeline.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing Opportunity stage definitions are consistent and account for nuances across the business, but they're used inconsistently. Opportunity teams are created and used to help deal progression.</p> <p>Recommended Level: Optimized Sales reps and managers input and maintain opportunity records to consistently drive value with customers.</p>	<ul style="list-style-type: none"> To ensure effective opportunity management, foster the right culture. Align on the roles within the opportunity management process. Determine expectations by role, and assign specific resources to those roles. Encourage collaboration by creating opportunity teams. Establish a consistent opportunity management process based on the company's go-to-market strategy. 	<p>Beginning</p> <ul style="list-style-type: none"> Collaborate with Quip Build Great APIs and Integrations with Mulesoft

maturity levels	best practices	recommended solutions
	<ul style="list-style-type: none"> • Align on a set of sales motions, and define the opportunity process for each motion. • Define a consistent set of opportunity stages with entry and exit criteria to move from stage to stage. • Align forecast categories and probabilities to opportunity stages. • Establish a methodology to drive sales productivity. • Engage with contacts, manage activities, and track next steps. • Drive collaboration using online tools. • Use mobile technology to increase seller efficiency. 	

Lead Generation

Attract prospective customers to engage with your brand. Capture prospective customers as prospects or leads.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing We have somewhat robust awareness and lead generation marketing campaigns, but we haven't used journeys.</p> <p>Recommended Level: Optimized We have fairly robust awareness and lead generation marketing campaigns, and we have customer journeys that are fairly personalized.</p>	<ul style="list-style-type: none"> • Increase prospective customer engagement by including a call to action message that includes specific details on how to engage. • Capture and track leads in a CRM system. • Capture leads by including forms or tags on every page of your site. • Capture lead information in pop-ups that provide special offers in exchange for the customer's email address. • Capture leads from Live Chat sessions on your site or through your mobile app. • Drive engagement with interactive content. • Amplify lead generation by encouraging sharing in communities and social channels. • Test to identify the tactics that work best. 	<p>Beginning</p> <ul style="list-style-type: none"> • Sales Cloud: Manage Leads(Accelerator) Learn about effective lead management • Generate Leads from Your Website for Your Sales Teams • Get to Know Marketing Cloud <p>Intermediate</p> <ul style="list-style-type: none"> • Salesforce & Account Engagement Integration Align Marketing and Sales Teams with Marketing Cloud Account Engagement Integration • Generate Leads with Account Engagement Landing Pages and Forms • B2B Marketing Analytics Basics

maturity levels	best practices	recommended solutions
		<ul style="list-style-type: none"> Account Engagement: B2B Marketing Analytics <p>Advanced</p> <ul style="list-style-type: none"> Use Account Engagement with Salesforce <p>Streamline your sales and marketing efforts into one platform</p> <ul style="list-style-type: none"> Take on B2B and B2C Marketing with Account Engagement and Journey Builder (Solution Kit)

Quote Management

Create, send, and store quotes.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing</p> <p>Multiple quotes can be aligned to an opportunity and can go through an approval process. A delegation of authority matrix drives the approval process.</p> <p>Recommended Level: Optimized</p> <p>Integrations exist between the CRM, quoting, and contracting systems to provide visibility and simplify approvals. The delegation of authority matrix for approvals is reviewed on a consistent basis.</p>	<ul style="list-style-type: none"> Align on the tools and integrations used to support the CPQ process. Support the configuration, pricing, and quoting of an opportunity. Create a price book with a consistent set of product families with associated products, services, and prices. Allow a quote to be generated based on the information provided on an opportunity. Enable a methodology to drive CPQ activities in the sales process. Set up guided selling to assemble an accurate and complete configuration. Determine how to manage discounts. Create a delegation of authority matrix and automate the approval process. 	<p>Beginning</p> <ul style="list-style-type: none"> Configure Price Books, Templates, and Contracts <p>Intermediate</p> <ul style="list-style-type: none"> Get Started with CPQ(Accelerator) Get Started with Guided Selling(Accelerator) Create and Manage an Optimized Product Catalog(Accelerator) Best Practices for Price Rules <p>Provide a seamless reorder experience using the negotiated Sales Agreement object in Manufacturing</p>

System Integration

Support planning by giving employees and customers the same view of sell-in and sell-out data, promotion/planogram compliance, stock outs, and trend analysis for volume planning.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing Sales agreements are targeted by month and quarter.</p> <p>Recommended Level: Optimized We engage in joint business planning, use collaborative documents, and have a calendar-centric view of promotions. Account-based forecasting is available for net new business from existing customers and beyond the base volume sales agreement.</p>	<ul style="list-style-type: none"> Review the sales view plan and revenue data and systems. Integrate compliance policies, data, and systems. Integrate rebates, data, and systems. Integrate promotions data and systems, including a shared calendar. Add collaboration document capability. 	<p>Beginning</p> <ul style="list-style-type: none"> Get Started with Sales Agreements <p>Track target metrics for retail, HoReCa, and professional channels</p> <p>Intermediate</p> <ul style="list-style-type: none"> Build Great APIs and Integrations with Mulesoft Use Prebuilt Assets from Mulesoft(AppExchange)

Data Visualization

Use visual elements to better express the significance of data.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing Data visualization is a part of the CRM system, but the data isn't always updated in real time. The data is accessible by the right users, but the training and delivery method don't always meet seller needs.</p> <p>Recommended Level: Optimized Data visualization tools are integrated and updated in real time. The customer-facing sales team can access the interactive sales dashboards from where they work most.</p>	<ul style="list-style-type: none"> Establish a process for creating insightful data visualizations, including how visualizations are selected, who sets them up, and how data access is handled. Enable employees to act based on insights from data visualization. To improve data visualization over time, create a feedback loop. Surface actional dashboards to sellers where they work most. Ensure that the data visualization tools are connected to the applicable data sources for real-time updates. 	<p>Beginning</p> <ul style="list-style-type: none"> Explore with CRM Analytics <p>Intermediate</p> <ul style="list-style-type: none"> Success with Einstein Analytics Deploy and Use Analytics for Consumer Goods <p>Use KPIs and data visibility for accountability</p>

Customer Communities

Create and maintain communities in which you can collaborate with your customers on a unified platform to create customer-specific sales agreements and joint business plans.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing Collaborative documents are used for sales agreements and joint business planning.</p>	<ul style="list-style-type: none"> Determine the set of documents and tools to share with channel partners. 	<p>Beginning</p> <ul style="list-style-type: none"> Improve Partner Collaboration with Experience Cloud

maturity levels	best practices	recommended solutions
<p>Recommended Level: Optimized</p> <p>A community portal is available with secure logins to access data, reports and dashboards, collaborative sales agreements, and joint business planning. Customers can post or upload key information.</p>	<ul style="list-style-type: none"> • Provide channel partners with collaborative documents for sales agreements. • Add joint business planning. • Launch a community portal with secure logins for channel partners to collaborate. Provide the ability to post or upload key information. 	<ul style="list-style-type: none"> • Community Cloud: Plan Your Chatter Adoption (Accelerator)

Optimize Field Execution

Empower your consumer goods products field reps to get the most out of every outlet. Mobile devices help reps manage lead-to-order and perfect execution while enabling them to be more consultative throughout the selling process.

Field service execution and monitoring, including in-store and outlet-based activities such as promotional activities, asset management, and retail audits, are critical to consumer goods companies. According to Nielsen, over 52% of in-store merchandising and marketing is considered ineffective (“Omnichannel Fast Facts on the In-Store and Ecommerce Landscapes,” October 2018). Improving execution effectiveness can generate in-store sales opportunities and improve consumer satisfaction.

Optimizing field execution allows consumer goods companies to:

- Deliver a consistent brand experience and deepen relationships.
- Achieve higher-value consultative selling by providing mobile access to accelerate repeat audit tasks.
- Drive efficiency with intelligent delivery using real-time insights to optimize routes.

To find the best ways to measure the success of your field execution optimizations, review [Calculate Key Performance Indicators](#).

Products

These products can help you optimize field execution.

- [Consumer Goods Cloud](#), including Salesforce Maps
- [Enterprise Territory Management](#)
- [CRM Analytics for Consumer Goods](#)
- [Marketing Cloud Account Engagement](#) for Lead Creation
- [Sales Engagement](#) for virtual visits
- [CPQ](#) (Foodservice/Professional)
- [Field Service](#)
- [Experience Cloud](#)
- [B2B Commerce](#)
- [MuleSoft](#)

Solutions

Salesforce recommended solutions are linked to business capabilities. To help you find solutions that your business is ready for right now, we divide resources into three levels depending on complexity. Choose from solutions that you can implement immediately, and

put together a roadmap to build out more mature capabilities over time. For more information about solutions, contact your Success Manager or Account Executive.

Business Capabilities

For each capability, whether it's undeveloped or industry-leading, we provide implementation information, metrics to evaluate success, and recommended solutions. View additional details to learn about maturity levels and best practices for these capabilities.

Capability	success metrics	recommended solutions
<p>Territory Administration</p> <p>Organize sellers into territories and hierarchies to provide access to accounts, opportunities, cases, and other data related to the account. Learn More on page 23</p>	<ul style="list-style-type: none"> • Increased customers per rep • Increased productivity based on average profit per sales reps 	<p>Beginning</p> <ul style="list-style-type: none"> • Get Started with Salesforce Maps Configuration • Territory Management Basics <p>Intermediate</p> <ul style="list-style-type: none"> • Enterprise Territory Management Define the area your reps are responsible for targeting • Salesforce Maps Territory Planning Analyze and design sales territories
<p>Resource Coverage and Availability</p> <p>Manage how field resources are positioned against territories. Learn More on page 23</p>	<ul style="list-style-type: none"> • Decreased average travel time to appointment • Decreased resource idle time • Decreased average miles per task 	<p>Beginning</p> <ul style="list-style-type: none"> • Get Started with Field Execution • Retail Execution for Sales Managers Plan store visits for your field reps and analyze your business's health across stores • Salesforce Maps
<p>Fleet Management and Vehicle Tracking</p> <p>See where vehicles are, where they've been, and their current status. Learn More on page 23</p>	<ul style="list-style-type: none"> • Decreased average travel time to appointments • Increased profit per job 	<p>Intermediate</p> <ul style="list-style-type: none"> • Get Recommended Visits Make store visits more efficient and productive with intelligent
<p>Merchandising and Audit</p> <p>Ensure retail execution compliance, including shelf space, merchandising conditions, and promotions, by capturing key performance indicators (KPIs). Learn More on page 23</p>	<ul style="list-style-type: none"> • Increased first-time fix rate • Decreased asset downtime • Increased asset lifespan • Increased compliance in the areas of facing, promotion, inventory and store price • Decreased out of stock situations 	<p>Beginning</p> <ul style="list-style-type: none"> • Take Charge of Your Day Launch the Field Execution app on your mobile • Inventory Checks Track products that are on sale at a retail store

Capability	success metrics	recommended solutions
		<ul style="list-style-type: none"> • Action Plan Template Create a reusable template for field execution • Define Retail Store KPIs <p>Intermediate</p> <ul style="list-style-type: none"> • CT Mobile (AppExchange) Offline field execution app • Axy (AppExchange) Offline field execution app • Connected Digital Front Office Offline field execution app <p>Advanced</p> <ul style="list-style-type: none"> • Planogram Checks Track how your products appear to consumers on a shelf
<p>Guided Selling Help reps sell in the field with support from AI and analytics. Learn More on page 23</p>	<ul style="list-style-type: none"> • Increased number of qualified leads per technician • Increased profit per job • Increased profit per tech 	<p>Beginning</p> <ul style="list-style-type: none"> • Promotion Checks Use promotion checks to assess the impact of promotions on your sales • In-Store Survey Gather feedback from store staff and customers with in-store surveys • Order Creation Make sure that your products are never out of stock at stores by creating in-store order
<p>Virtual Field Execution Leverage digital technology and channels to execute field visits virtually. Learn More on page 23</p>	<ul style="list-style-type: none"> • Reduced field execution costs • Increased store performance based on average sales amount per store 	<p>Advanced</p> <ul style="list-style-type: none"> • Sales Engagement Basics Accelerate your inside sales process with a high-productivity workspace
<p>Preventative Maintenance Maintain your assets installed in the field. Learn More on page 23</p>	<ul style="list-style-type: none"> • Increased first-time fix rate • Decreased asset downtime • Decreased warranty leakage 	<p>Beginning</p> <ul style="list-style-type: none"> • Learn About the Salesforce Platform Advantage

Capability	success metrics	recommended solutions
	<ul style="list-style-type: none"> Increased asset lifespan 	<ul style="list-style-type: none"> Get Started with Service Cloud for Lightning Experience
Trunk Stock Track and understand your inventory's availability and location. Learn More on page 23	<ul style="list-style-type: none"> Improved inventory balance Decreased average travel time 	Intermediate <ul style="list-style-type: none"> Assign a Vehicle to a Rep Streamline store deliveries Delivery Task Delivery the shipments to stores and update the actual delivered quantities
Visit Analytics Use data, insights, and analytics to support and inform field team visits and increase effectiveness. Learn More on page 23=	<ul style="list-style-type: none"> Improved store performance based on average sales amount per store 	Beginning <ul style="list-style-type: none"> Deploy and Use Analytics for Consumer Goods Get insights on your territory, stores, and sales rep performance with Analytics Intermediate <ul style="list-style-type: none"> Explore Einstein Object Detection and CRM Analytics Analytics Improve in-store checks and maximize efficiency

[Business Capabilities for Optimize Field Execution](#)

Get a detailed view of maturity levels, best practices, and recommended solutions for enhancing field service capabilities for consumer goods organizations.

Business Capabilities for Optimize Field Execution

Get a detailed view of maturity levels, best practices, and recommended solutions for enhancing field service capabilities for consumer goods organizations.

Use maturity levels to determine your organization's progress in each capability area. Implementing best practices and recommended solutions improve maturity in each area.

These capabilities represent the most critical capabilities in this business area.

- Territory Administration
- Resource Coverage and Availability
- Fleet Management and Vehicle Tracking
- Merchandising and Audit
- Guided Selling

- Virtual Field Execution
- Preventative Management
- Trunk Stock
- Visit Analytics

Territory Administration

Organize sellers into territories and hierarchies to provide access to accounts, opportunities, cases, and other data related to the account.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing Territory management is handled within the CRM platform. Access to some objects or fields remains a challenge for some roles.</p> <p>Recommended Level: Optimized All roles and sellers are properly aligned with the access they need for their job. However, the territories aren't balanced. A territory mapping tool is used to model scenarios.</p>	<ul style="list-style-type: none"> • Structure territories into hierarchies that are representative of the sales organization, account segmentation, go-to-market strategies, and forecasting requirements. • Operationalize territory plans by designing them for maintainability. • Assess the best technical fit for organizational requirements. • Define the territory model, hierarchy, assignment rules, and overlay requirements to align with the sales strategy. • Establish a process that supports complex and continuously evolving sales structures and coverage. • Design territories upwards from their lowest-level planning unit. • To drive and maintain alignment on accounts, synchronize with a single source of truth (SSOT). 	<p>Beginning</p> <ul style="list-style-type: none"> • Get Started with Salesforce Maps Configuration • Territory Management Basics <p>Intermediate</p> <ul style="list-style-type: none"> • Enterprise Territory Management Define the area your reps are responsible for targeting • Salesforce Maps Territory Planning Analyze and design sales territories

Resource Coverage and Availability

Manage how field resources are positioned against territories.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Emerging Resources are sent to specific areas reactively.</p> <p>Recommended Level: Practicing Resource coverage is planned to service all areas.</p>	<ul style="list-style-type: none"> • Implement processes to identify, categorize, and codify skills, availability, and coverage. • Administer a resources profile, and match resources with customer needs during scheduling. 	<p>Beginning</p> <ul style="list-style-type: none"> • Get Started with Field Execution • Retail Execution for Sales Managers <p>Plan store visits for your field reps and analyze your business's health across stores</p>

maturity levels	best practices	recommended solutions
		<ul style="list-style-type: none"> • Salesforce Maps

Fleet Management and Vehicle Tracking

See where vehicles are, where they've been, and their current status.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Emerging Visibility into where the vehicle is supposed to be based on available work order data.</p> <p>Recommended Level: Optimized A historical view into vehicle location and routing. Based on trends, routing accuracy can be improved.</p>	<ul style="list-style-type: none"> • Use a fleet management system to track real-time location of vehicles. • Track driving behavior for compliance. 	<p>Intermediate</p> <ul style="list-style-type: none"> • Get Recommended Visits Make store visits more efficient and productive with intelligent

Merchandising and Audit

Ensure retail execution compliance, including shelf space, merchandising conditions, and promotions, by capturing key performance indicators (KPIs).

maturity levels	best practices	recommended solutions
<p>Minimum Level: Minimal Merchandising and audit are fully manual, paper-based processes.</p> <p>Recommended Level: Optimized Automatic maintenance work generation is based on defined frequencies until the end of the contract.</p>	<ul style="list-style-type: none"> • Automate data collection about the state of assets. • Feed data into maintenance plans and processes for proactive service. • Give techs, agents, and inventory managers a 360-degree view of your assets, maintenance plans, and service plans. 	<p>Beginning</p> <ul style="list-style-type: none"> • Take Charge of Your Day Launch the Field Execution app on your mobile • Inventory Checks Track products that are on sale at a retail store • Action Plan Template Create a reusable template for field execution • Define Retail Store KPIs <p>Intermediate</p> <ul style="list-style-type: none"> • CT Mobile (AppExchange) Offline field execution app • Axy (AppExchange) Offline field execution app

maturity levels	best practices	recommended solutions
		<ul style="list-style-type: none"> • Connected Digital Front Office Offline field execution app <p>Advanced</p> <ul style="list-style-type: none"> • Planogram Checks Track how your products appear to consumers on a shelf

Guided Selling

Help reps sell in the field with support from AI and analytics.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Minimal Cross-sell or up-sell opportunities for service exist, but opportunities are ad hoc. No formal process exists to support the efforts.</p> <p>Recommended Level: Practicing Incentives and measures are in place, but the impact or contribution to growth by the service organization isn't significant.</p>	<ul style="list-style-type: none"> • Provide field service reps with knowledge of and visibility into the sales process for identifying qualified leads in the field. • To encourage reps to uncover more leads, create a transparent and timely spiff process. 	<p>Beginning</p> <ul style="list-style-type: none"> • Promotion Checks Use promotion checks to assess the impact of promotions on your sales • In-Store Survey Gather feedback from store staff and customers with in-store surveys • Order Creation Make sure that your products are never out of stock at stores by creating in-store order

Virtual Field Execution

Leverage digital technology and channels to execute field visits virtually.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Emerging Store managers capture photos and submit to the manufacturer.</p> <p>Recommended Level: Optimized Field team members host virtual video call store visits, capturing information, and recommending actions to take and which channel to use.</p>	<ul style="list-style-type: none"> • Provide retailers with access to a portal. • Have retailers capture photographs and upload them to the portal. • To capture more information from portal users, add survey capabilities to portals. • Conduct virtual store visits using video calls with retailers. 	<p>Advanced</p> <ul style="list-style-type: none"> • Sales Engagement Basics Accelerate your inside sales process with a high-productivity workspace

maturity levels	best practices	recommended solutions
	<ul style="list-style-type: none"> Use AI to recommend the activities to be done by channel. 	

Preventative Management

Maintain your assets installed in the field.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Minimal Preventative management is a fully manual, paper-based process.</p> <p>Recommended Level: Optimized Maintenance work is automatically generated based on defined frequencies until contract end of life.</p>	<ul style="list-style-type: none"> Provide techs, agents, and inventory managers a 360-degree view of the state of assets. Set up processes by which data about assets is collected automatically and feeds your maintenance plans. 	<p>Beginning</p> <ul style="list-style-type: none"> Learn About the Salesforce Platform Advantage Get Started with Service Cloud for Lightning Experience

Trunk Stock

Track and understand your inventory's availability and location.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Minimal Inventory availability and location are best guesses. And guesswork leads to delays.</p> <p>Recommended Level: Optimized Product documentation, knowledge articles, and accurate inventory information about the parts required are embedded in each work order.</p>	<ul style="list-style-type: none"> Use analytics to plan for parts needed on an individual vehicle level. 	<p>Intermediate</p> <ul style="list-style-type: none"> Assign a Vehicle to a Rep Streamline store deliveries Delivery Task Delivery the shipments to stores and update the actual delivered quantities

Visit Analytics

Use data, insights, and analytics to support and inform field team visits and increase effectiveness.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Emerging Key performance indicators (KPIs) are tracked at a store level. They're updated and reported consistently, but manually.</p>	<ul style="list-style-type: none"> Write definitions for each KPI. Communicate to and enable field teams. 	<p>Beginning</p> <ul style="list-style-type: none"> Deploy and Use Analytics for Consumer Goods

maturity levels	best practices	recommended solutions
<p>Recommended Level: Optimized</p> <p>Store performance is captured at a product level and can be aggregated for the stores assigned to each field rep.</p>	<ul style="list-style-type: none"> • Evolve data capture to the product level within stores. • Add the ability to aggregate stores by field rep. • Use analytics to identify relationships between field execution activities, volumes, store, and product performance. 	<p>Get insights on your territory, stores, and sales rep performance with Analytics</p> <p>Intermediate</p> <ul style="list-style-type: none"> • Explore Einstein Object Detection and CRM Analytics <p>Improve in-store checks and maximize efficiency</p>

Transform B2B Commerce

Provide consumer goods channel partners seamless, collaborative experiences by delivering a consumer-grade digital B2B commerce experience.

Eliminate manual purchase orders (POs) and maximize revenues by digitizing your services and extending your field team. An upgraded digital experience lets you tailor offers to suit individual customer needs, such as personalized pricing lists and visibility into available inventory and product information. Enable smarter sales and service by providing your B2B customers with another channel for self-service commerce.

Transforming B2B commerce allows brands to:

- Offer streamlined purchasing by personalizing online ordering with customized sites.
- Create B2C-like digital engagement that uses data-fueled insights to craft intelligent journeys.
- Drive collaborative growth, and reach long-tail customers with faster, smarter service.
- Provide personalized experience with customer-specific pricing.

To find the best ways to measure the success of your B2B commerce transformation, review [Calculate Key Performance Indicators](#).

Products

These products can help you transform B2B commerce.

- [Consumer Goods Cloud](#), including Salesforce Maps
- [Service Cloud](#)
- [Einstein Bots](#)
- [MuleSoft](#)
- [Experience Cloud](#)
- [B2B Commerce](#)

Solutions

Salesforce recommended solutions are linked to business capabilities. To help you find solutions that your business is ready for right now, we divide resources into three levels depending on complexity. Choose from solutions that you can implement immediately, and put together a roadmap to build out more mature capabilities over time. For more information about solutions, contact your Success Manager or Account Executive.

Business Capabilities

For each capability, whether it's undeveloped or industry-leading, we provide implementation information, metrics to evaluate success, and recommended solutions. View additional details to learn about maturity levels and best practices for these capabilities.

Capability	success metrics	recommended solutions
<p>Order on Behalf Of</p> <p>Give an employee the ability to place orders with the correct price and product for a customer using the same platform customers use. Learn More on page 32</p>	<ul style="list-style-type: none"> • Increased average order value • Reduced cart abandonment rate • Increased customer satisfaction • Reduced cost of sales 	<p>Beginning</p> <ul style="list-style-type: none"> • Sell Everywhere with Commerce Cloud • Administer Salesforce B2B Commerce on Lightning Experience • Build Omni-Channel B2B Service for Your Agents (video) • Get Started: Metrics and Analytics B2B Commerce • Administer Salesforce B2B Commerce on Lightning Experience <p>Set up stores, products, catalogs, and entitlements in Salesforce B2B Commerce.</p> <ul style="list-style-type: none"> • B2B Commerce: Organize Your Teams (Accelerator) • B2B Commerce: Metrics and Analytics <p>Improve your B2B Commerce storefront using data.</p>
<p>Case Management Approach</p> <p>Categorize and triage a case early for accurate handling. Assign ownership of a case based on skills, availability, and equitable distribution for agents' performance goals. Escalate case resolution based on priority and service-level agreement (SLA) expectations. Learn More on page 32</p>	<ul style="list-style-type: none"> • Increased first contact resolution rate • Increased amount of service and support sales • Increased customer satisfaction score (CSAT) • Decreased cost to serve 	<p>Beginning</p> <ul style="list-style-type: none"> • Learn About the Salesforce Platform Advantage • Get Started with Service Cloud for Lightning Experience • Learn Knowledge Centered Service with Service Cloud • Salesforce Customer Service Strategies • Salesforce Surveys for Admins <p>Measure Service KPIs and Customer Satisfaction with Salesforce Surveys</p>
<p>Channel Strategy Approach</p> <p>Plan an approach for handling service requests from multiple channels. Ensure</p>	<ul style="list-style-type: none"> • Increased case deflection rate • Increased first contact resolution rate 	<p>Beginning</p> <ul style="list-style-type: none"> • Digital Engagement

Capability	success metrics	recommended solutions
<p>that service is part of the marketing and commerce customer experience. Associate the support approach and agents with the channel and customer needs. Learn More on page 32</p>	<ul style="list-style-type: none"> Increased amount of service and support sales Reduced number agents needed Increase customer satisfaction score (CSAT) 	<p>Engage with Customers on Any Device to Deliver Exceptional Experiences</p>
<p>Next Best Action</p> <p>Provide proactive recommendations to service agents on what to do next based on customer and industry data and built-in business logic. Use AI to predict, detect, profile, and classify cases across the customer service organization. Learn More on page 32</p>	<ul style="list-style-type: none"> Increased case deflection Increased first contact resolution rate Reduced number of agents needed Increased customer satisfaction score (CSAT) 	<p>Beginning</p> <ul style="list-style-type: none"> Make Customer Service Smarter <p>Intermediate</p> <ul style="list-style-type: none"> Predict Case Escalation with Einstein (Workshop)
<p>Validation Rules</p> <p>Validate order lines against a workflow that depends on back-office systems and determined business rules. Learn More on page 32</p>	<ul style="list-style-type: none"> Increased cross-sell/up-sell revenue Increased customer satisfaction score (CSAT) Reduced cost of sales Increased number of orders 	<p>Beginning</p> <ul style="list-style-type: none"> Connect Your Data to Your Store Offer Products in Your Store Plan Your Category Structure Create Entitlement Policies <p>Define which products a buyer can see</p> <ul style="list-style-type: none"> Create Price Books and Associate them with a Store or Buyer Group Add Buyer Accounts to Buyer Groups
<p>Contract Pricing and Entitlements</p> <p>Allow customer-negotiated pricing and entitled products to drive the perfect order, supporting one or multiple active contracts. Learn More on page 32</p>	<ul style="list-style-type: none"> Increased customer lifetime value (CLV) Increased commerce channel orders Reduced cost of sales Reduced number of invoicing disputes 	<p>Beginning</p> <ul style="list-style-type: none"> Improve Partner Collaboration with Experience Cloud Experience Cloud: Self Service Experience Fast Start (Accelerator) <p>Deliver connected, cross-channel digital experiences</p> <ul style="list-style-type: none"> Build a Lightning Partner Community Define Your Partner Community Member Journey (Accelerator) Manage Partner Community Sharing (Accelerator) Plan Your Partner Experience Roadmap (Accelerator)

Capability	success metrics	recommended solutions
		<ul style="list-style-type: none"> • Experience Cloud Basics Manage Digital Experience and Workspaces with Experience Cloud • Learn Experience Cloud Extend Channels to Direct and Indirect Sales <p>Intermediate</p> <ul style="list-style-type: none"> • Synchronize Product and Pricing Data (Solution Kit) Establish a single source of truth for products and pricing data in CPQ and B2B Commerce • Partner Relationship Management Learn how Sales Cloud PRM can help you achieve your channel sales goals • Understanding Community Member Experience To Accelerate Adoption And Engagement (Video) • Target Personalized Recommendations • Assessing Your Self-Service Community Experience • Knowledge-Centered Service with Service Cloud • Scale Service with Self-Help <p>Advanced</p> <ul style="list-style-type: none"> • Link Cart to Quote (Solution Kit) Integrate B2B Commerce carts with CPQ to allow sales representatives to finalize quotes and customers to complete orders • Link Cart to Cash (Solution Kit) Connect B2B Commerce with CPQ billing and order information to improve the revenue management process • Build a Community with Knowledge and Chat

Capability	success metrics	recommended solutions
		<ul style="list-style-type: none"> Track Adoption and Traffic with Google Analytics Advanced Search Engine Optimization (SEO) for Lightning Communities
<p>Personalized Experiences</p> <p>Tailor the store experience to the buyer based on intelligent or localized content including product and pricing information. Learn More on page 32</p>	<ul style="list-style-type: none"> Increased account or partner adoption Increased number of leads Increased revenue Accelerated sales lifecycle 	<p>Intermediate</p> <ul style="list-style-type: none"> Personalize Experience Cloud Sites with Audience Targeting Accelerate Adoption and Engagement in Digital Experience Measure, Monitor, and Grow with Self-Service Experience Best Practices Scale Service with Self-Help Enable Distributed Marketing View Account Engagement: B2B Marketing Analytics Build a Community with Knowledge and Chat Google Analytics Basics Advanced Search Engine Optimization (SEO) for Communities Launch a PRM Experience from a Branded Mobile App with Push Notifications

[Business Capabilities for Transform B2B Commerce](#)

Get a detailed view of maturity levels, best practices, and recommended solutions for enhancing commerce capabilities for consumer goods organizations.

Business Capabilities for Transform B2B Commerce

Get a detailed view of maturity levels, best practices, and recommended solutions for enhancing commerce capabilities for consumer goods organizations.

Use maturity levels to determine your organization’s progress in each capability area. Implementing best practices and recommended solutions improve maturity in each area.

These capabilities represent the most critical capabilities in this business area.

- Order on Behalf Of
- Case Management Approach
- Channel Strategy

- Next Best Action
- Validation Rules
- Contract Pricing and Entitlements
- Personalized Experiences

Order on Behalf Of

Give an employee the ability to place orders with the correct price and product for a customer using the same platform customers use.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Emerging Order trigger notifications based on status change are entered manually.</p> <p>Recommended Level: Optimized Sales and service teams enter orders on behalf of customers in an assisted selling motion with customers.</p>	<ul style="list-style-type: none"> • Provide an ordering component or trigger button in the CRM. • Place orders in the same system as online orders. • Ensure that order on behalf of orders follow the same validation rules as other online orders. 	<p>Beginning</p> <ul style="list-style-type: none"> • Sell Everywhere with Commerce Cloud • Administer Salesforce B2B Commerce on Lightning Experience • Build Omni-Channel B2B Service for Your Agents (video) • Get Started: Metrics and Analytics B2B Commerce • Administer Salesforce B2B Commerce on Lightning Experience <p>Set up stores, products, catalogs, and entitlements in Salesforce B2B Commerce.</p> <ul style="list-style-type: none"> • B2B Commerce: Organize Your Teams (Accelerator) • B2B Commerce: Metrics and Analytics <p>Improve your B2B Commerce storefront using data.</p>

Case Management Approach

Categorize and triage a case early for accurate handling. Assign ownership of a case based on skills, availability, and equitable distribution for agents' performance goals. Escalate case resolution based on priority and service-level agreement (SLA) expectations.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Emerging Cases are generated automatically through common, basic channels such</p>	<ul style="list-style-type: none"> • Make sure that the case layout is clear, concise, and easy for agents to understand. 	<p>Beginning</p> <ul style="list-style-type: none"> • Learn About the Salesforce Platform Advantage

maturity levels	best practices	recommended solutions
<p>as CTI connectors, email-to-case, and web-to-case. Cases are worked on primarily in siloes and on a first come, first served basis.</p> <p>Recommended Level: Practicing Cases are worked on primarily through one system or on-screen UI. Other systems and swivel-chairing still exist as needed. Requests are routed to agents based on their relevant skills. The system accounts for agent availability and current workload.</p>	<ul style="list-style-type: none"> • Provide collaboration spaces for agents, such as Chatter, Quip, Slack, or other social channels. • Keep customers updated throughout the case lifecycle using their preferred channel. • Assign agents and case management processes to dedicated queues. • Configure queues around channels, entitlements, and agent skill sets. 	<ul style="list-style-type: none"> • Get Started with Service Cloud for Lightning Experience • Learn Knowledge Centered Service with Service Cloud • Salesforce Customer Service Strategies • Salesforce Surveys for Admins <p>Measure Service KPIs and Customer Satisfaction with Salesforce Surveys</p>

Channel Strategy Approach

Plan an approach for handling service requests from multiple channels. Ensure that service is part of the marketing and commerce customer experience. Associate the support approach and agents with the channel and customer needs.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Emerging Two or more support channels exist. Agents are assigned to work within one channel.</p> <p>Recommended Level: Practicing Channels are integrated with agent visibility across channels. A strategy is in place to open channels to meet customer expectations.</p>	<ul style="list-style-type: none"> • Provide the ability for customers to interact with your service organization across multiple channels, such as social, phone, email, web, and more. • Review current channel use in conjunction with a redefined consumer segmentation strategy to develop a cohesive channel strategy. • Analyze channel use to determine your key channels, the return on investment (ROI), and issues by channel. Redirect service agent focus and resources accordingly. • Understand your customer and their needs. Align your digital service based on this understanding 	<p>Beginning</p> <ul style="list-style-type: none"> • Digital Engagement <p>Engage with Customers on Any Device to Deliver Exceptional Experiences</p>

Next Best Action

Provide proactive recommendations to service agents on what to do next based on customer and industry data and built-in business logic. Use AI to predict, detect, profile, and classify cases across the customer service organization.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Optimized Business rules are defined and leveraged to recommend the next best action to agents when working on a service request.</p> <p>Recommended Level: Leading Business rules, predictive models, and data across the organization are leveraged to deliver the right action at the right time to the right person.</p>	<ul style="list-style-type: none"> Use AI to predict, detect, profile, and classify cases across the customer service organization. Provide productivity gains by automatically relating multi-channel correspondence and resolution notes to the case lifecycle. Use customer context and AI to recommend knowledge. Recommend articles based on relevance to the request they're working on. 	<p>Beginning</p> <ul style="list-style-type: none"> Make Customer Service Smarter <p>Intermediate</p> <ul style="list-style-type: none"> Predict Case Escalation with Einstein (Workshop)

Validation Rules

Validate order lines against a workflow that depends on back-office systems and determined business rules.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing Pricing and payment rules are validated during the online checkout processes, which ensure that capturing the perfect order and payment types isn't limited to purchase orders.</p> <p>Recommended Level: Optimized Sales and service teams enter orders on behalf of or in an assisted selling motion with customers.</p>	<ul style="list-style-type: none"> Ensure that orders follow the same validation rules, regardless of who places them. Support optional workflows for customer approvals. Support order on behalf capability in the mobile app. 	<p>Beginning</p> <ul style="list-style-type: none"> Connect Your Data to Your Store Offer Products in Your Store Plan Your Category Structure Create Entitlement Policies <p>Define which products a buyer can see</p> <ul style="list-style-type: none"> Create Price Books and Associate them with a Store or Buyer Group Add Buyer Accounts to Buyer Groups

Contract Pricing and Entitlements

Allow customer-negotiated pricing and entitled products to drive the perfect order, supporting one or multiple active contracts.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Emerging Specific pricing models are based on full price waterfall (global, regional, segment, account) pricing methods.</p>	<ul style="list-style-type: none"> Personalize the catalog and pricing for logged-in users. Allow customers to select between multiple contracts. 	<p>Beginning</p> <ul style="list-style-type: none"> Improve Partner Collaboration with Experience Cloud Experience Cloud: Self Service Experience Fast Start (Accelerator)

maturity levels	best practices	recommended solutions
<p>Recommended Level: Optimized Pricing strategies to promote whitespace products, new products, or underperforming products are tied to campaign programs.</p>	<ul style="list-style-type: none"> • Make non-contract products available for purchase. 	<p>Deliver connected, cross-channel digital experiences</p> <ul style="list-style-type: none"> • Build a Lightning Partner Community • Define Your Partner Community Member Journey (Accelerator) • Manage Partner Community Sharing (Accelerator) • Plan Your Partner Experience Roadmap (Accelerator) • Experience Cloud Basics <p>Manage Digital Experience and Workspaces with Experience Cloud</p> <ul style="list-style-type: none"> • Learn Experience Cloud <p>Extend Channels to Direct and Indirect Sales</p> <p>Intermediate</p> <ul style="list-style-type: none"> • Synchronize Product and Pricing Data (Solution Kit) <p>Establish a single source of truth for products and pricing data in CPQ and B2B Commerce</p> <ul style="list-style-type: none"> • Partner Relationship Management <p>Learn how Sales Cloud PRM can help you achieve your channel sales goals</p> <ul style="list-style-type: none"> • Understanding Community Member Experience To Accelerate Adoption And Engagement (Video) • Target Personalized Recommendations • Assessing Your Self-Service Community Experience • Knowledge-Centered Service with Service Cloud • Scale Service with Self-Help <p>Advanced</p> <ul style="list-style-type: none"> • Link Cart to Quote (Solution Kit) <p>Integrate B2B Commerce carts with CPQ to allow sales representatives</p>

maturity levels	best practices	recommended solutions
		<p>to finalize quotes and customers to complete orders</p> <ul style="list-style-type: none"> • Link Cart to Cash (Solution Kit) Connect B2B Commerce with CPQ billing and order information to improve the revenue management process • Build a Community with Knowledge and Chat • Track Adoption and Traffic with Google Analytics • Advanced Search Engine Optimization (SEO) for Lightning Communities

Personalized Experiences

Tailor the store experience to the buyer based on intelligent or localized content including product and pricing information.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing The B2B Commerce store provides the buyer with the ability to find products and purchase those products.</p> <p>Recommended Level: Optimized The Unified Portal (Service) and Commerce experience are provided via a single sign-on and navigation for a personalized experience.</p>	<ul style="list-style-type: none"> • Translate the site experience into the local language and currency upon first visit. • Personalize content based on the logged-in user. • Present search results and content based on audience, segment, or customer. 	<p>Intermediate</p> <ul style="list-style-type: none"> • Personalize Experience Cloud Sites with Audience Targeting • Accelerate Adoption and Engagement in Digital Experience • Measure, Monitor, and Grow with Self-Service Experience Best Practices • Scale Service with Self-Help • Enable Distributed Marketing • View Account Engagement: B2B Marketing Analytics • Build a Community with Knowledge and Chat • Google Analytics Basics • Advanced Search Engine Optimization (SEO) for Communities • Launch a PRM Experience from a Branded Mobile App with Push Notifications

Incentivize Channel Partners

Offer enhanced experiences to consumer goods partners to improve indirect sales performance, influence partners' behavior, and build B2B loyalty.

B2B loyalty management enables consumer goods companies to better engage customers and partner channels with incentives that improve partner performance and their bottom line. Brands that excel at deploying the right mix, level, and cadence of incentives often improve revenue and profit from the channel, expand the breadth and depth of customer relationships, and increase mind share. Channel incentives and program management solutions automate and scale channel incentives across a broad set of partners.

Incentivizing channel partners allows brands to:

- Build loyalty by creating value for members, building value beyond a discount, and rewarding members for expanding your network.
- Boost return on investment (ROI) with an integrated solution that accelerates time to value by creating a single source of truth that uses insights to improve performance.
- Capture mind share with engaging programs and by creating perks for engagement.
- Use your program as another touchpoint that expands your reward options with program partners.

To find the best ways to measure the success of B2B loyalty programs, review the [Analytics for Loyalty](#) dashboards.

Products

These products can help you transform B2B commerce.

- [Consumer Goods Cloud](#)
- [Loyalty Cloud](#)
- [Rebates Management](#)
- [Experience Cloud](#)

Solutions

Salesforce recommended solutions are linked to business capabilities. To help you find solutions that your business is ready for right now, we divide resources into three levels depending on complexity. Choose from solutions that you can implement immediately, and put together a roadmap to build out more mature capabilities over time. For more information about solutions, contact your Success Manager or Account Executive.

Business Capabilities

For each capability, whether it's undeveloped or industry-leading, we provide implementation information, metrics to evaluate success, and recommended solutions. View additional details to learn about maturity levels and best practices for these capabilities.

Capability	success metrics	recommended solutions
<p>Single View of the Customer</p> <p>Align relevant data sources at the individual customer level to support customer-centric marketing efforts. Learn More on page 40</p>	<ul style="list-style-type: none"> • Increased customer lifetime value (CLV) • Reduced customer attrition rate 	<p>Beginning</p> <ul style="list-style-type: none"> • Improve Partner Collaboration with Communities • Manage Digital Experience and Workspaces with Experience Cloud • Salesforce Loyalty Management Basics

Capability	success metrics	recommended solutions
		<ul style="list-style-type: none"> • Manage Loyalty Program Partners <p>Intermediate</p> <ul style="list-style-type: none"> • Knowledge Centered Service with Service Cloud • Scale Service with Self-Help • Deploy and Use Analytics for Loyalty • Get Insights into Partner Performance <p>Advanced</p> <ul style="list-style-type: none"> • Build a Community with Knowledge and Chat
<p>Marketing Vision and Value Proposition</p> <p>Create a vision based on how your brand delivers on the promise and value to customers. Articulate the unique benefits of your brand, product, or service through marketing. Learn More on page 40</p>	<ul style="list-style-type: none"> • Increased customer lifetime value (CLV) • Reduced customer attrition rate 	<p>Beginning</p> <ul style="list-style-type: none"> • Set Up Loyalty Processes • Set Up Experiences for Loyalty Program Members
<p>Rebates Management</p> <p>Improve revenue and profit by tracking, reviewing, and analyzing a customer's progress and attainment relative to trade incentives and rebates. Learn More on page 40</p>	<ul style="list-style-type: none"> • Increased average order value • Increased growth rate • Improved compliance 	<p>Beginning</p> <ul style="list-style-type: none"> • Define Rebate Programs to Easily Calculate Rebate Amounts <p>Intermediate</p> <ul style="list-style-type: none"> • Analyze Rebate Programs and Boost Your Business with Rebate Analytics
<p>Partner Relationship Management</p> <p>Identify, manage, and enable suitable partners to sell a defined set of products and services to specific customers. Learn More on page 40</p>	<ul style="list-style-type: none"> • Closed more deals • Increased customer lifetime value (CLV) 	<p>Beginning</p> <ul style="list-style-type: none"> • View Member Program Payout Details <p>View enhanced details about rebate programs and members</p> <ul style="list-style-type: none"> • Collaborate with Partners Using the Manufacturing Experience Cloud Site <p>Provide up-to-date incentive program accrual and payout information to your sales teams and partners</p>

[Business Capabilities for Transform B2B Commerce](#)

Get a detailed view of maturity levels, best practices, and recommended solutions for enhancing commerce capabilities for consumer goods organizations.

Business Capabilities for Transform B2B Commerce

Get a detailed view of maturity levels, best practices, and recommended solutions for enhancing commerce capabilities for consumer goods organizations.

Use maturity levels to determine your organization’s progress in each capability area. Implementing best practices and recommended solutions improve maturity in each area.

These capabilities represent the most critical capabilities in this business area.

- Single View of the Customer
- Marketing Vision and Value Proposition
- Rebates Management
- Partner Relationship Management

Single View of the Customer

Align relevant data sources at the individual customer level to support customer-centric marketing efforts.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing About 50% of data sources are aligned. We’re starting to pursue an identity solution.</p> <p>Recommended Level: Optimized About 75% of data sources are aligned. We have a solid identity solution, but it could be improved.</p>	<ul style="list-style-type: none"> • Identify stakeholders. Develop a customer-centric reporting roadmap. • Implement a strong master data management (MDM) program that supports an end-to-end process. • Create a roadmap that prioritizes the data sources required to build a single view of a customer. • Unify data sources across platforms so that marketers and decision makers can view and respond to comprehensive information about customers. 	<p>Beginning</p> <ul style="list-style-type: none"> • Improve Partner Collaboration with Communities • Manage Digital Experience and Workspaces with Experience Cloud • Salesforce Loyalty Management Basics • Manage Loyalty Program Partners <p>Intermediate</p> <ul style="list-style-type: none"> • Knowledge Centered Service with Service Cloud • Scale Service with Self-Help • Deploy and Use Analytics for Loyalty • Get Insights into Partner Performance <p>Advanced</p> <ul style="list-style-type: none"> • Build a Community with Knowledge and Chat

Marketing Vision and Value Proposition

Create a vision based on how your brand delivers on the promise and value to customers. Articulate the unique benefits of your brand, product, or service through marketing.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing Some customers understand our value proposition, others don't. The value proposition doesn't adequately differentiate the company from its competitors.</p> <p>Recommended Level: Optimized Most customers understand the value proposition. It helps to differentiate the company from competitors.</p>	<ul style="list-style-type: none"> Identify customer benefits, and link them to mechanisms for how the product or service delivers value. Map the basis for differentiation based on what drives target market customers' needs and desires. Identify brand strengths and key areas of differentiation. Write the value proposition. Treat a value proposition like an elevator pitch for the product or service. Ensure that the value proposition is based on what potential customers value—not on what you think they value. 	<p>Beginning</p> <ul style="list-style-type: none"> Set Up Loyalty Processes Set Up Experiences for Loyalty Program Members

Rebates Management

Improve revenue and profit by tracking, reviewing, and analyzing a customer's progress and attainment relative to trade incentives and rebates.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Emerging Customer incentives and rebates are tracked and monitored manually.</p> <p>Recommended Level: Optimized Cross-sell opportunities are clearly identified and order-level change recommendations are available.</p>	<ul style="list-style-type: none"> Identify cross-sell opportunities from a holistic view of the customer's attainment progress. Use AI to recommend order-level changes to improve the customer's sales and profit based on available rebates. 	<p>Beginning</p> <ul style="list-style-type: none"> Define Rebate Programs to Easily Calculate Rebate Amounts <p>Intermediate</p> <ul style="list-style-type: none"> Analyze Rebate Programs and Boost Your Business with Rebate Analytics

Partner Relationship Management

Identify, manage, and enable suitable partners to sell a defined set of products and services to specific customers.

maturity levels	best practices	recommended solutions
<p>Minimum Level: Practicing The partner relationship management (PRM) program has clear goals and</p>	<ul style="list-style-type: none"> Define goals and measurements for your partner program. 	<p>Beginning</p> <ul style="list-style-type: none"> View Member Program Payout Details

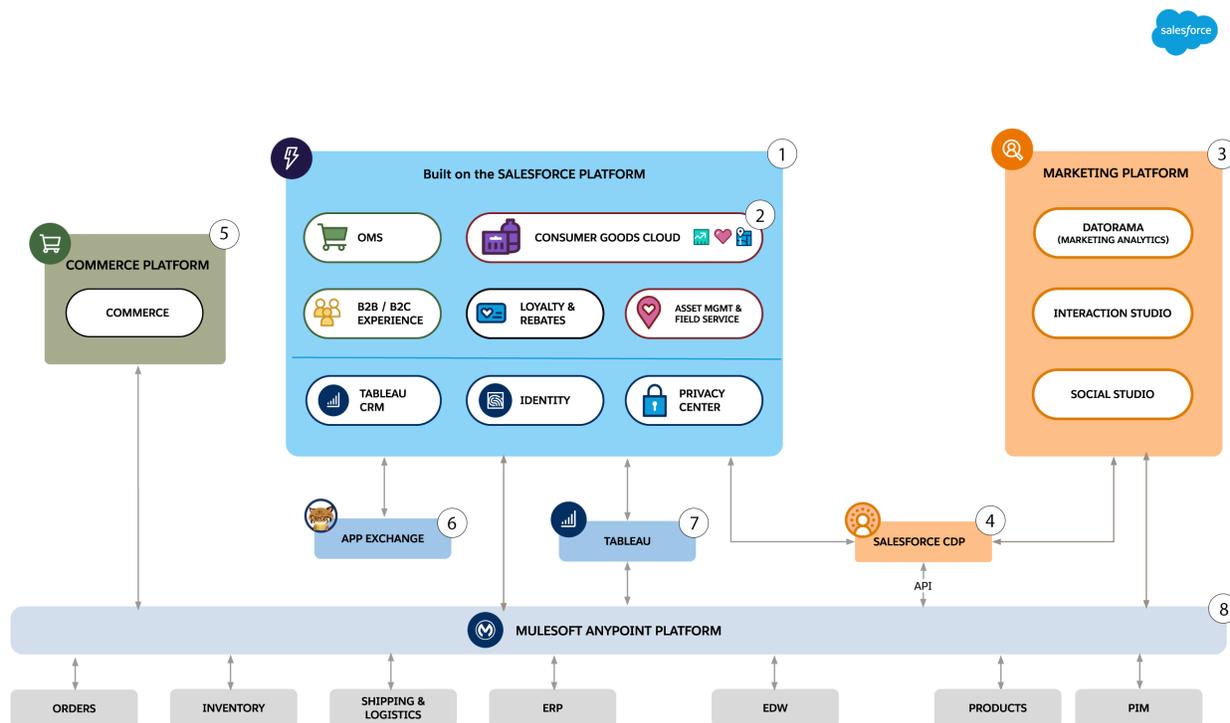
maturity levels	best practices	recommended solutions
<p>metrics, and real-time reporting and analytics are used to improve channel performance.</p> <p>Recommended Level: Optimized</p> <p>In addition to focusing on recruiting partners, the organization focuses on managing and growing the partner program, and on offering seamless and hassle-free ways of working for partners.</p>	<ul style="list-style-type: none"> • Understand market opportunity based on research and trusted data. • Set goals aligned to your company's business objectives. • Set goals for partners according to their maturity as a partner. Be realistic about forecasted sales growth, especially for new partners. • Establish behavior-focused leading metrics, such as number of deals registered, and results-focused lagging metrics, such as attrition percent. • Develop a reporting plan and dashboards analyzing the health of your PRM program and partner engagement. 	<p>View enhanced details about rebate programs and members</p> <ul style="list-style-type: none"> • Collaborate with Partners Using the Manufacturing Experience Cloud Site <p>Provide up-to-date incentive program accrual and payout information to your sales teams and partners</p>

Solution Architecture for Consumer Goods

Identify the specific tools and resources that can help you deliver comprehensive automation solutions for your consumer goods business.

Solution architecture diagrams show you how recommended products interoperate with backend systems and how data is passed between them. [Learn with Trailhead](#).

Consumer Goods Solution Architecture with Key Clouds



The Salesforce Consumer Goods architecture runs on three highly scalable and interoperable platforms: the core Salesforce Platform, Marketing Cloud, and Commerce Cloud.

Products built on the Salesforce Platform (1) include Consumer Goods Cloud, Sales, Service, Experience, Order Management System, Loyalty Management, Rebate Management, Asset Management, Field Service, Customer 360 Identity, and Customer 360 Privacy Manager. These products run on the same physical platform and share a common data model.

- APIs enable integration with other Salesforce and non-Salesforce platforms.
- The Salesforce Platform can be used for customer master and consent management, or it can integrate with a third-party Master Data Management system.
- Order Management System (OMS) is a Commerce Cloud product, but it runs natively on the core Salesforce Platform.
- CRM Analytics has direct connections to the Salesforce Platform and is best suited for Sales and Service analytics.
- Customer 360 Identity features single sign-on (SSO) and authentication management to ensure employees, customers, and partners sign on safely across all your applications and systems.
- Customer 360 Privacy Center manages data retention, rights, and actively manages consent to ensure compliance with global and local privacy and consent rules.
- Pre-built connectors such as Marketing Cloud Connect go even further to enable other expedited integration options.
- The Salesforce Platform can be used in several ways.
 - As a customer master
 - As an editable or non-editable certified copy of customer master data
 - To integrate with a third Master Data Management system

Consumer Goods Cloud (2) is a superset of Sales Cloud and Service Cloud features, customized for consumer goods companies. It provides other elements within its data model, such as consumer goods-specific objects. Consumer Goods Cloud integrates sales, service, and retail execution capabilities to provide a consistent experience across your sales, merchandising, and key account management functions.

The Salesforce Marketing Cloud (3) is a powerful suite of communication and marketing automation tools designed for interoperability.

- Datorama offers deep marketing analytics.
- Interaction Studio provides real-time interaction management, personalization, and AI-drive recommendations.
- Social Studio enables social monitoring and social media interaction management.

Data Cloud (4) is Salesforce's enterprise-wide CDP solution. Data Cloud delivers a unified profile by bringing together customer source records, transactions, engagement activities, demographics, and signals from first or third-party data sources. It provides marketers a single source of truth for their customer and makes that data available for creating personalized experiences across every touchpoint.

Commerce Platform (5) is a highly scalable Commerce platform for web and mobile ecommerce.

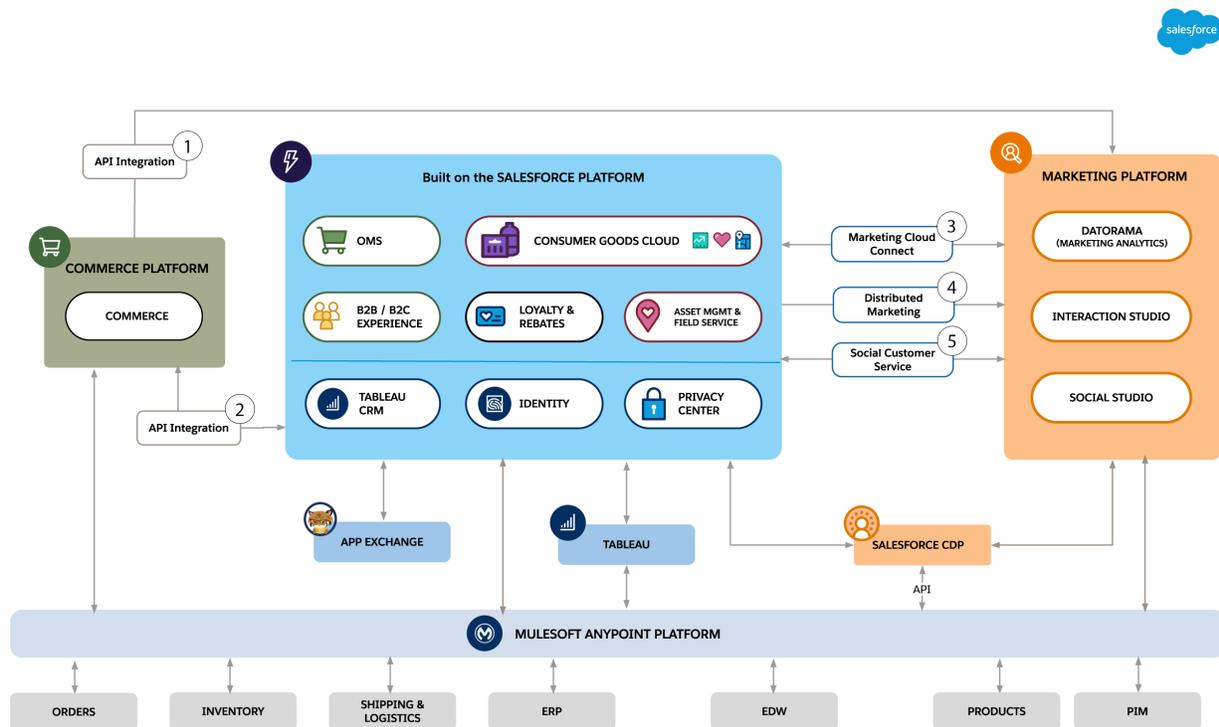
AppExchange (6) is the leading enterprise cloud marketplace, with over 4,000 solutions to help extend Salesforce into any department or industry. Over 1,000 consultants have deep expertise to drive business transformation.

Tableau (7) is a business intelligence platform and has direct connections to the rest of the Salesforce ecosystem. Tableau provides analytics independent of data sources.

Mulesoft Anypoint Platform (8) is an integration platform designed for service-oriented architecture (SOA), Software as a Service (SaaS), and APIs. Mule ESB, CloudHub iPaaS, API Manager, and hundreds of SaaS and on-premises connectors and templates are the building blocks of this unique connectivity platform for integration.

- Use APIs to connect applications, data, and devices, both on-premise and in the cloud.
- Rearchitected a service-oriented architecture from legacy systems, proprietary platforms, and customer integration code.
- Migrate technology infrastructure to the public or private cloud, and prioritize adoption of SaaS applications and other cloud technologies.
- Deploy integrations in a hybrid environment, connecting to SaaS applications and on-premises systems.

Consumer Goods Solution Architecture with Connectors



Developing point-to-point connections with API solutions allows customer experiences to cross Marketing, Service, and Commerce platform boundaries.

API Integration (1) allows the Commerce platform to initiate actions in the Marketing platform.

- Track page views, searches, product views, cart contents, and order placement.
- Manage marketing opt-ins, email subscriptions, and preferences.
- Trigger transactional email, including account creation and update messages, password recovery, customer service messages, and order confirmation.
- Trigger behavioral emails, such as messages about abandoned carts, and browse and wish list-related messaging using a combination of productized solutions and API integrations.
- Sync data such as product catalogs, customer information, order details, and promotional details.
- This connector is community code and provides a development framework for customers to follow.

API Integration (2) integrates Commerce Cloud to Service Cloud. The integration allows for data syncing between the two clouds to support several use cases.

- Submit cases from a storefront for anonymous or registered customers.
- Retrieve case details for a registered storefront customer from Service Cloud.
- Sync profiles of registered customers and profile-specific addresses between Commerce and Service Clouds.
- Provide Order on Behalf capabilities for service agents within the Service Console.
- Achieve order synchronization by using Salesforce Order Management.

- A community-based solution exists to provide an enablement framework for developing this integration. Contact your account team for more information.

[Marketing Cloud Connect](#) (3) connects Marketing platform products with Sales and Service Cloud products. The connector allows data to sync between clouds. It also allows Marketing Cloud products to trigger events such as emails and journeys based on Sales and Service Cloud data.

- Automatically sync data from Sales or Service Cloud to Marketing Cloud.
- Connect Journey Builder to other clouds.
- Use Sales and Service Cloud data to construct email.
- Provide Marketing Cloud email tracking data such to Sales and Service Cloud products.

[Distributed Marketing](#) (4) allows users in Sales and Service Clouds to view, personalize, and send on-brand, best practice content through Marketing Cloud.

- Use data stored in contact, lead, or person account records to address emails.
- Craft email to a segment of customers based on a list view.
- Send email about a campaign to a group of customers based on a touchpoint cadence managed by Marketing Cloud.

[Social Customer Service](#) (5) turns social network posts into case or lead records.

SEE ALSO:

[Salesforce Architectural Diagrams: Quick Look](#)

Explore Solution Kits for Consumer Goods

Enhance your cross-cloud business by implementing one or more solution kits. Get product recommendations, workflow details, and instructions to help you implement the solution from start to finish.

Related Content



- [Explore Salesforce Solution Kits](#)
- [Salesforce Solution Kits: Quick Look Trailhead Module](#)

Solution Kit	View in Salesforce Docs	Download Kit as a PDF
Synchronize Product and Pricing Data Establish a single source of truth for products and pricing data in CPQ and B2B Commerce.	View Now	Download PDF
Link Cart to Quote Integrate B2B Commerce carts with CPQ to allow sales representatives to finalize quotes and customers to complete orders.	View Now	Download PDF
Link Cart to Cash	View Now	Download PDF

Solution Kit	View in Salesforce Docs	Download Kit as a PDF
Connect B2B Commerce with CPQ billing and order information to improve the revenue management process.		
<p>Streamline Mass Reorders</p> <p>Provide a seamless reorder experience using the negotiated Sales Agreement object in an industry cloud, such as Consumer Goods Cloud or Manufacturing Cloud.</p>	View Now	Download PDF
<p>Take on B2B and B2C Marketing with Account Engagement and Journey Builder</p> <p>Execute B2B (considered purchase) and B2C (transactional purchase) marketing initiatives across your business units using features like lead scoring, Salesforce integration, multi-channel messaging, journeys, and transactional messaging.</p>	View Now	Download PDF