



# A Global Marketer's Odissey

Exploring Tech-Marketing Trends

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current and potential litigation involving us or our industry, including litigation involving acquired entities, and the resolution or settlement thereof; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including any efforts to expand our services; the success of our strategy of acquiring or making investments in complementary businesses, joint ventures, services, technologies and intellectual property rights; our ability to complete, on a timely basis or at all, announced transactions; our ability to realize the benefits from acquisitions, strategic partnerships, joint ventures and investments, and successfully integrate acquired businesses and technologies; our ability to compete in the markets in which we participate; the success of our business strategy and our plan to build our business, including our strategy to be a leading provider of enterprise cloud computing applications and platforms; our ability to execute our business plans; our ability to continue to grow unearned revenue and remaining performance obligation; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; our ability to limit customer attrition and costs related to those efforts; the success of our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations, including as a result of acquisitions; our ability to preserve our workplace culture, including as a result of our decisions regarding our current and future office environments or remote work policies; our dependency on the development and maintenance of the infrastructure of the Internet; our real estate and office facilities strategy and related costs and uncertainties; fluctuations in, and our ability to predict, our operating results and cash flows; the variability in our results arising from the accounting for term license revenue products; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; the impact of future gains or losses from our strategic investment portfolio, including gains or losses from overall market conditions that may affect the publicly traded companies within our strategic investment portfolio; our ability to protect our intellectual property rights; our ability to maintain and enhance our brands; the impact of foreign currency exchange rate and interest rate fluctuations on our results; the valuation of our deferred tax assets and the release of related valuation allowances; the potential availability of additional tax assets in the future; the impact of new accounting pronouncements and tax laws; uncertainties affecting our ability to estimate our tax rate; uncertainties regarding our tax obligations in connection with potential jurisdictional transfers of intellectual property, including the tax rate, the timing of transfers and the value of such transferred intellectual property; uncertainties regarding the effect of general economic, business and market conditions, including inflationary pressures, general economic downturn or recession, market volatility, increasing interest rates, changes in monetary policy and the prospect of a shutdown of the U.S. federal government; the potential impact of financial institution instability; the impact of geopolitical events, including the ongoing armed conflict in Europe; uncertainties regarding the impact of expensing stock options and other equity awards; the sufficiency of our capital resources; our ability to execute our share repurchase program; our ability to comply with our debt covenants and lease obligations; the impact of climate change, natural disasters and actual or threatened public health emergencies; expected benefits of and timing of completion of the restructuring plan and the expected costs and charges of the restructuring plan, including, among other things, the risk that the restructuring costs and charges may be greater than we anticipate, our restructuring efforts may adversely affect our internal programs and ability to recruit and retain skilled and motivated personnel, our restructuring efforts may be distracting to employees and management, our restructuring efforts may negatively impact our business operations and reputation with or ability to serve customers, and our restructuring efforts may not generate their intended benefits to the extent or as quickly as anticipated; and our ability to achieve our aspirations, goals and projections related to our environmental, social and governance initiatives, including our ability to comply with emerging corporate responsibility regulations.



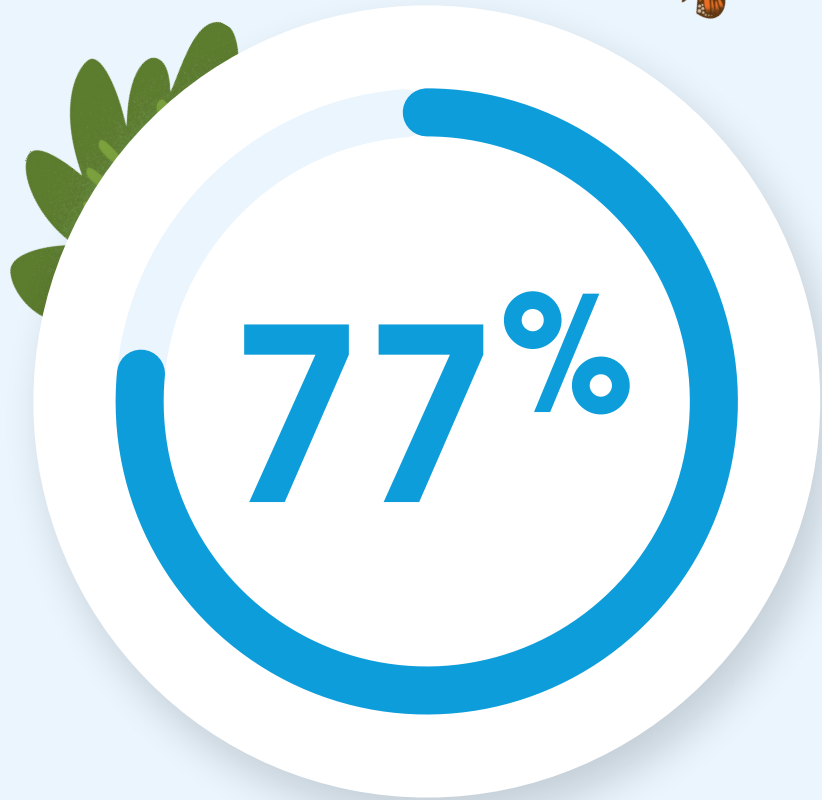
# 8

## Priorities for CEOs in 2024

- 1 Gen AI: The start of something big**  
Innovators dominate headlines. Scalpers dominate markets.
- 2 Outcompeting with technology**  
Most digital transformations fail to deliver the expected impact.
- 3 The energy transition. Time is short**  
Commitments are abundant; actions not so much. Leaders can make the next moves.
- 4 Navigating the road to courageous growth**  
All roads do not lead to Rome. Leaders need to find the path that works for them.
- 5 What's your superpower?**  
Institutional capability building: sounds dull right? It's anything but.
- 6 Learn to love your middle managers**  
Stop thinking of middle management as a way station. Instead, make it a destination.
- 7 Geopolitics: beating the odds**  
A new world order might be emerging from the current upheaval. Leaders can anticipate some shifts and position their companies for success.
- 8 A new lens on macroeconomy**  
Hard landing, soft landing, no landing at all? While analysts debate, smart leaders are moving on to consider the bigger picture.







**77%** of Business Leaders worry their company is **missing out** on generative AI.





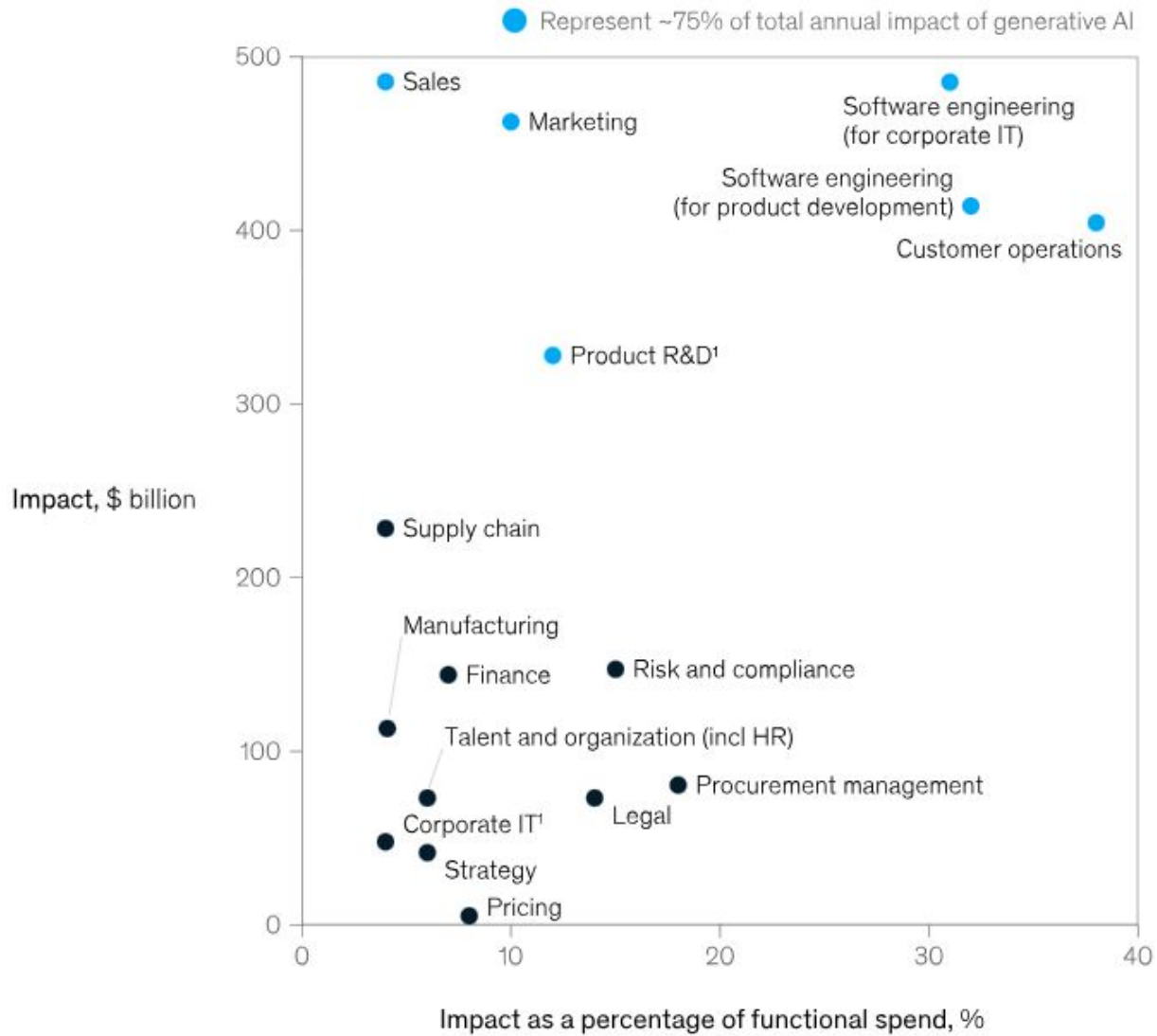
**4.4 tn**

Generative AI impact on  
productivity



**3.1 tn**

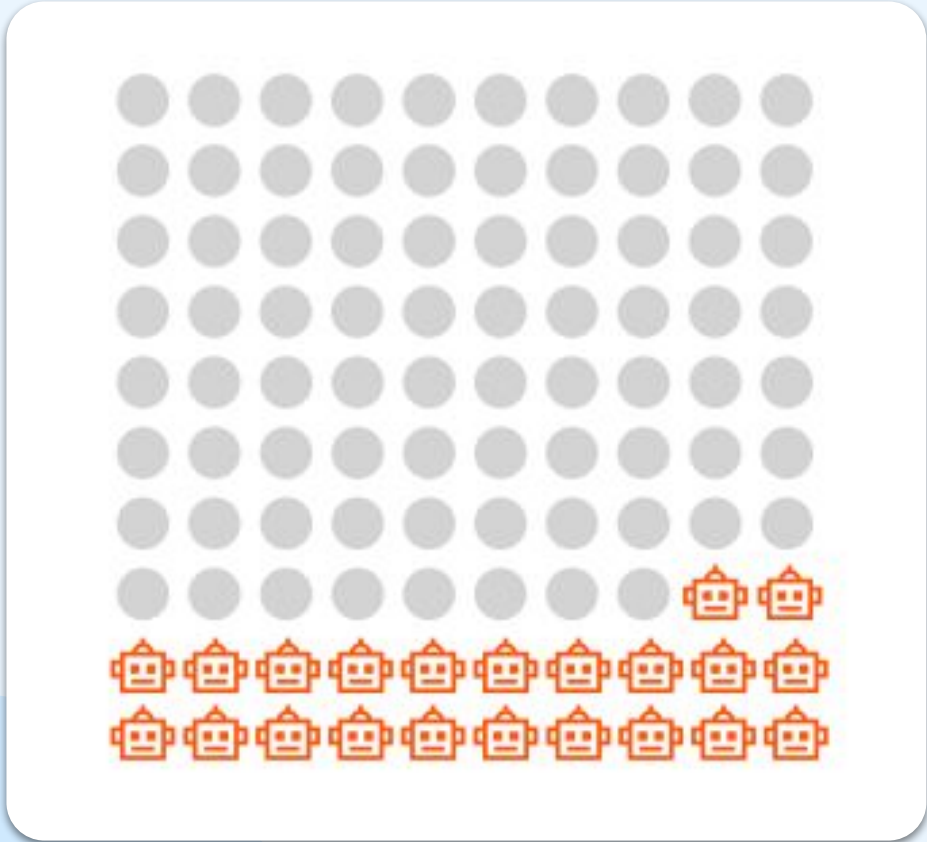
2021 GDP



# 75%

of the value that generative AI use cases could deliver falls across four areas: **Customer Operations, Marketing and Sales, Software Engineering and Research & Development.**





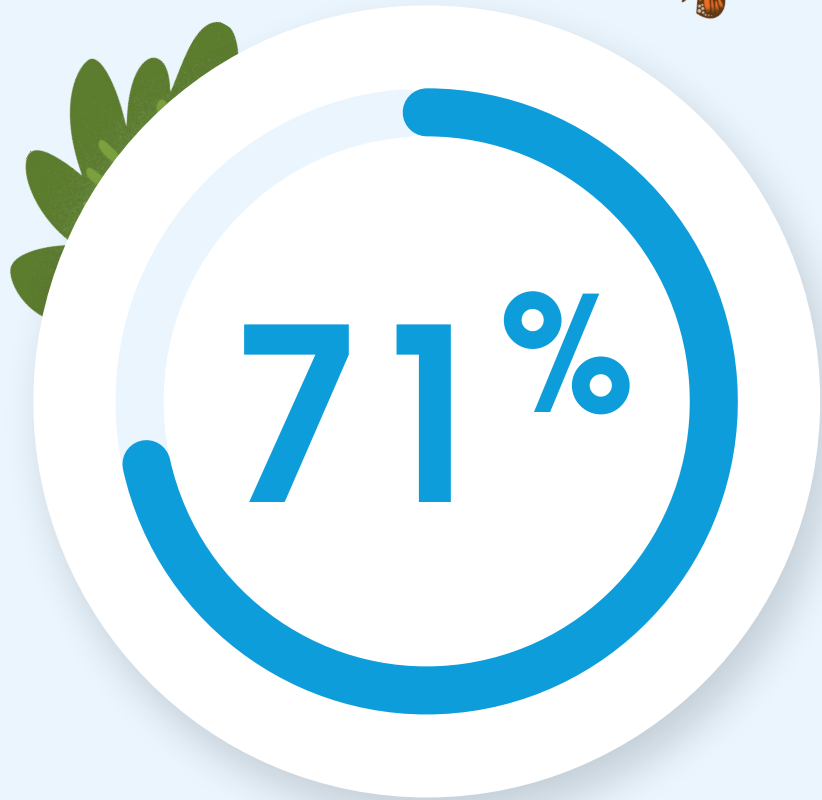
# 22%

Percentage of Marketing staff CMOs expect to replace with generative AI in the next 12-18 months

Source: 2023 Gartner Marketing Future Strategic Priorities Poll



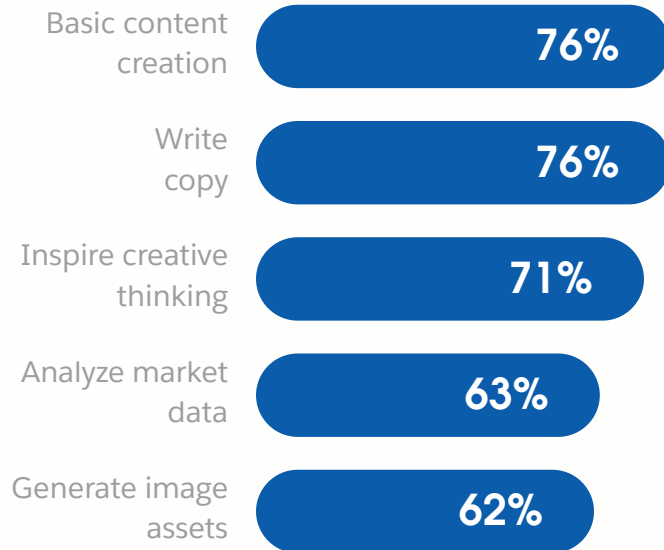




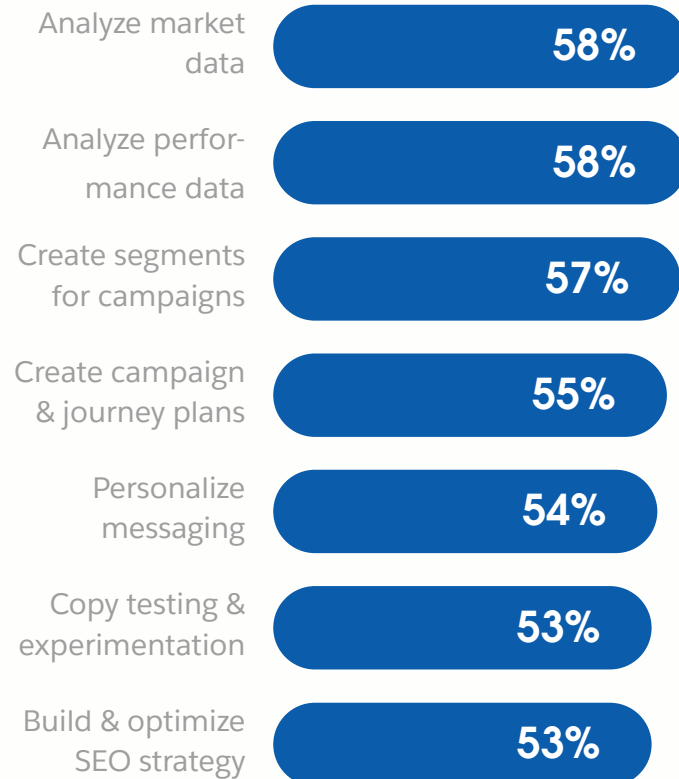
**of Marketers say generative AI will allow them to focus on more strategic work.**

...and save an average of five hours per week, in the process.

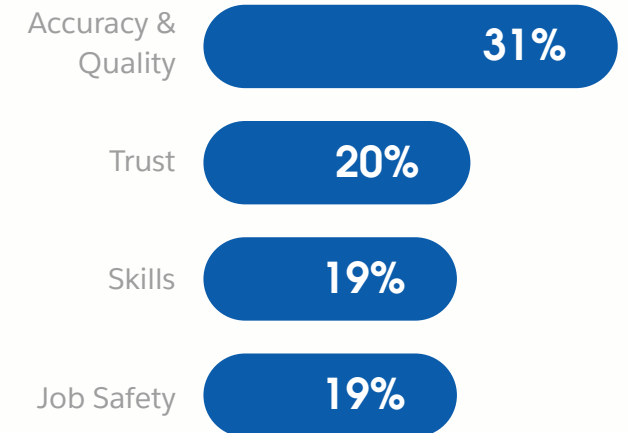
## How Marketers Use Generative AI



## How Generative AI is transforming Marketer's job



## Top Concerns around Generative AI at Work

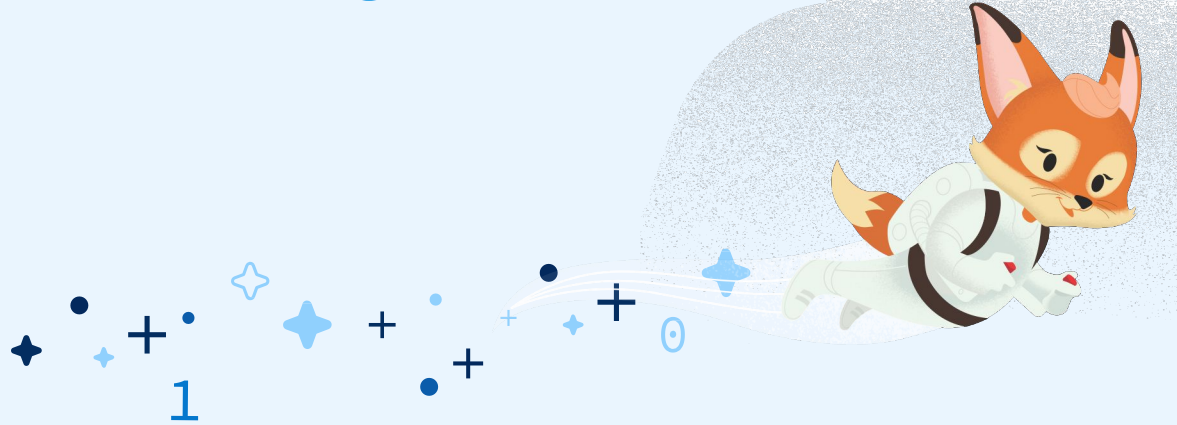




**of Marketers say their  
company's data is not properly  
set up for generative AI.**



# Every Company Needs an AI Strategy





# The AI Revolution

**Wave 1**


## Predictive

How to |

- How to increase conversions
- How to optimize spend
- How to personalize experiences
- How to grow relationships

**Wave 2**

## Generative



**Wave 3**

## Autonomous & Agents

How can I help you?



**Wave 4**

## Artificial General Intelligence




Image generated by Midjourney

# AI is... just part of the story

**1 AI and Machine learning**  
Used for customer segmentation, predictive analytics to forecast customer behavior, chatbots for customer service, and personalized content recommendations based on user data.

**3 Customer Data Platforms**  
Centralizing customer data from various touchpoints to create unified customer profiles, allowing for more personalized and targeted marketing campaigns.

**5 Data Privacy and Compliance Tools**  
Managing user consent, ensuring compliance with data protection regulations, and implementing ethical data practices to build trust with customers.

**7 Cross-Channel Marketing Tools**  
Orchestrating consistent and cohesive marketing messages across multiple channels to create a unified brand experience for customers.

**2 Marketing Automation**  
Streamlining repetitive tasks like email marketing, social media posting, lead nurturing, and campaign management, freeing up time for marketers to focus on strategy and creativity

**4 Personalization tools**  
Creating tailored experiences by analyzing customer behaviors and preferences to deliver personalized content, product recommendations, and targeted advertising.

**6 Predictive Analytics and Big Data Tools**  
Deriving actionable insights from large datasets to understand customer behavior, predict trends, optimize marketing strategies, and improve ROI.



## Connect

**Real-Time Data Streams**

Any Data  
Web • Mobile • APIs  
CRM • Devices

Near infinite scale


Historical Data

## Harmonize



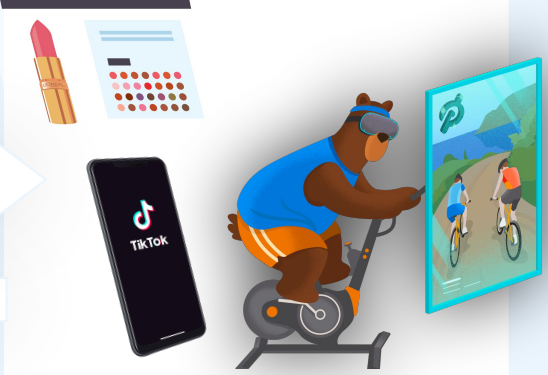
**Real-Time Customer Graph**

## Engage



**Real-Time Customer 360**

## Experience



**Real-Time Customer Magic**



# Ford builds trusted relationships with personalized customer experiences

salesforce

**Time to Value**  
Initial Rollout

**4**  
Months

Unifies customer data,  
activates it across channels and  
matches customers to  
engagement behavior



**99%**

Reduction in email  
templates

Provides dealers with leads and  
intelligent insights into  
customer behavior that help  
drive brand loyalty



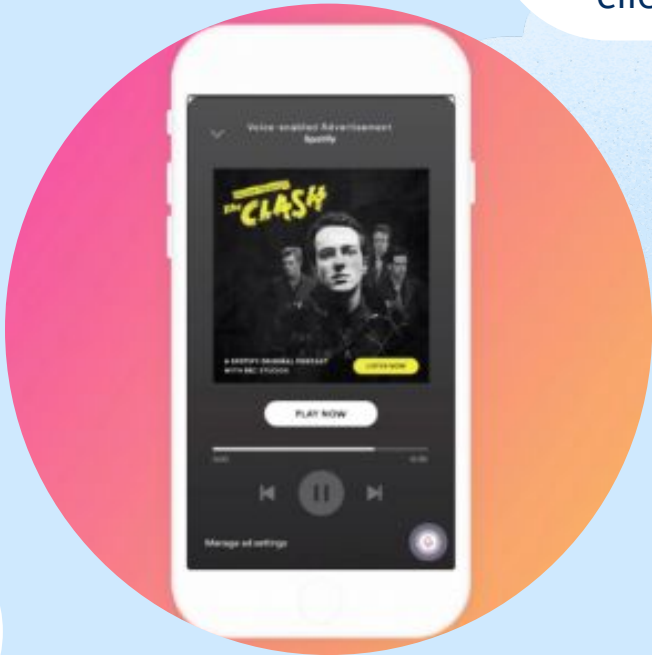
# Spotify delivers **real-time personalized experiences** for B2B ad sales



Establishes single source of truth for customer data and automates journeys across client lifecycle

Converted Leads  
(vs. 0,02% before implementing Salesforce)

14%



Growth in number of campaigns created in one year

5x

Decrease in time to access data for marketing campaigns

95%



# State of Marketing

## Portugal vs. EMEA



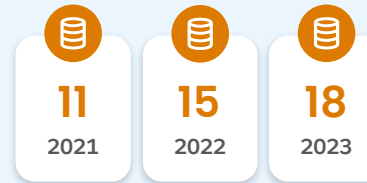
### Top 3 Priorities

- 1 Improving collaboration
- 2 Improving our use of tools and technologies
- 3 Building / retaining trust with customers

### Top 3 Challenges

- 1 Outdated tools and technologies
- 2 Insufficient human resources
- 3 Budgetary constraints

### Average Number of Data Sources Used



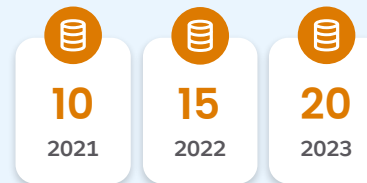
### Top 3 Priorities

- 1 Experimenting with new marketing strategies / tactics
- 2 Improving our use of tools and technologies
- 3 Modernising tools and technologies

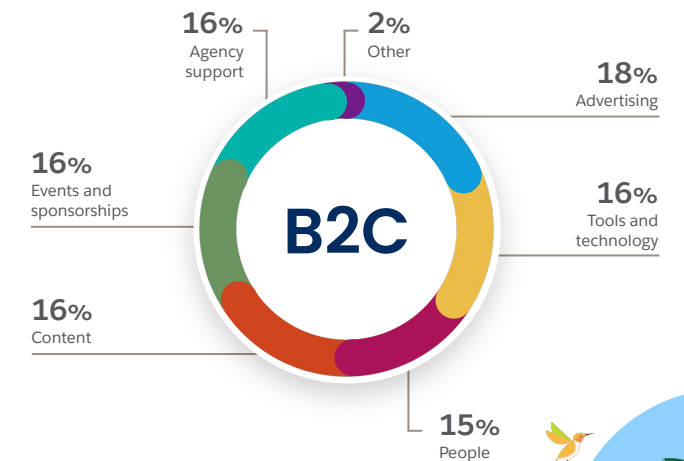
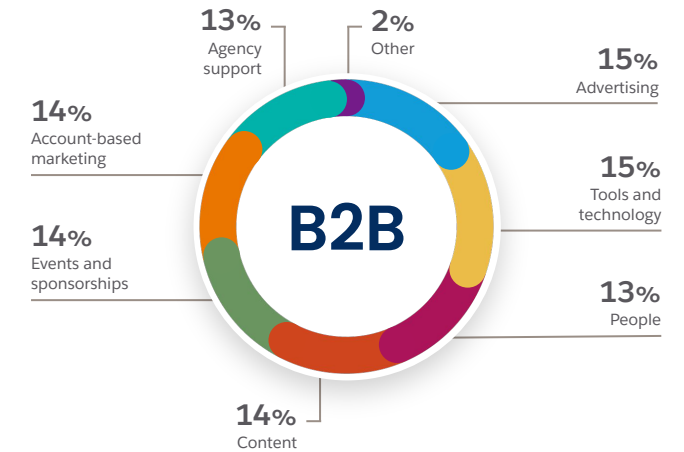
### Top 3 Challenges

- 1 Ineffective use of tools and technologies
- 2 Outdated tools and technologies
- 3 Balancing personalisation with customer comfort levels

### Average Number of Data Sources Used



### EMEA Marketing Budget Allocations





Obrigado