

Note:

The following slides are selected **excerpts from a larger presentation deck.**

Content has been modified and anonymized to preserve confidentiality.

*Megan
Palmisano.*



Autodesk AI Engagement

Salesforce Professional Services

With
Salesforce

Faster Value

AUTODESK

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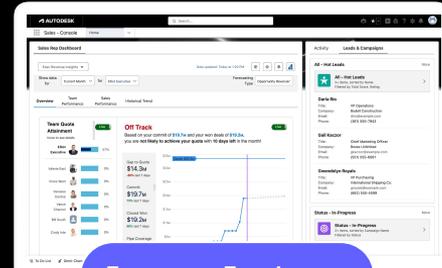
Drive Growth

Simplification

↑ Sales Productivity

*Sales navigator to guide a seller
to expand their impact*

- Accelerate sales velocity w/data insights
- Propensity to buy for up-sell/cross-sell
- Copilot & recommendations to guide sellers



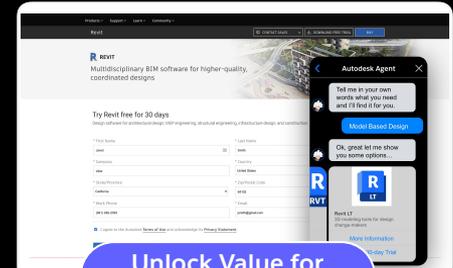
Empower Employees

Standardization

↑ Employee Satisfaction

*Targeted notifications, indications, and
recommendations to hit targets*

- Data insights for proactive notifications
- Collaboration, workflows, and automation for effective teaming
- Streamlined workspace for efficiency



Unlock Value for
"New Customer"

Self-Service

↑ Customer Satisfaction

*AI Embedded in the self-service customer
experience grounded in customer data*

- Autonomous GenAI Agent
- Data enriched marketing journeys
- Product-led growth self-service

Salesforce:
Platform for Scale

↑ Performance ↑ Autonomy & Scale ↑ Feature Velocity ↓ Technical Debt



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MEET

Kiara

Director of Technology

GOALS

- Oversee Uber's global real estate projects from conception to building
- Lead a cross-functional team, ensuring the team has access to the tools they need

FRUSTRATIONS

- Gaining visibility into her team's technology needs
- Matching the team's needs with the right product and tier, while staying in budget



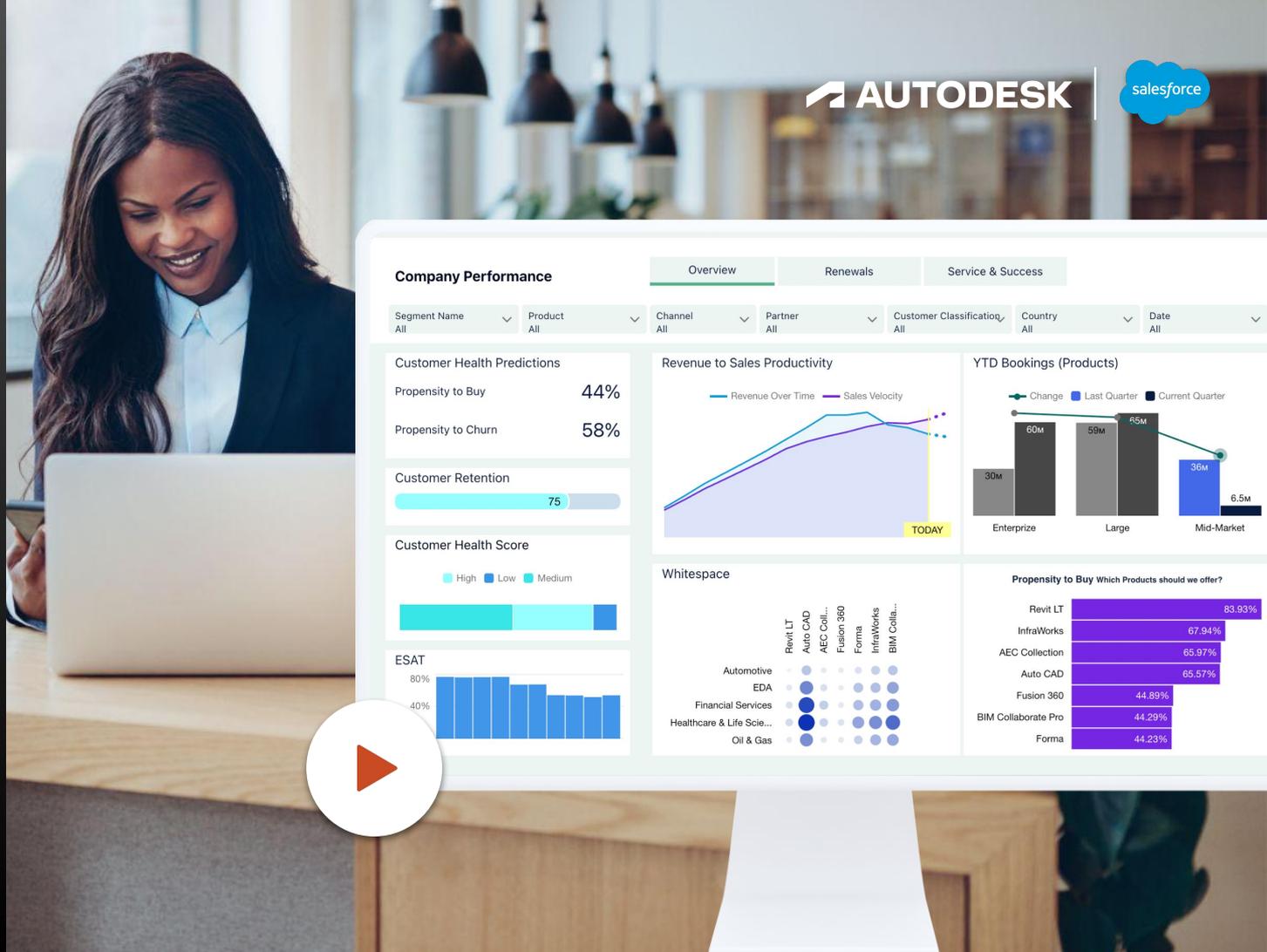
Prediction: Conversion Increases

As Kiara and her team engage with the product, their **Conversion Score** increases.

Value Levers

- ↑ Sales Productivity
- ↑ Deal Velocity

Powered By



Company Performance

Overview Renewals Service & Success

Segment Name: All Product: All Channel: All Partner: All Customer Classification: All Country: All Date: All

Customer Health Predictions

Propensity to Buy: **44%**

Propensity to Churn: **58%**

Customer Retention

75

Customer Health Score

High Low Medium

ESAT

80% 40%

Revenue to Sales Productivity

Revenue Over Time Sales Velocity

TODAY

YTD Bookings (Products)

Change Last Quarter Current Quarter

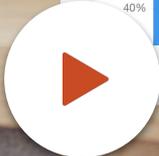
Enterprise	30M	60M	59M
Large		65M	65M
Mid-Market		36M	6.5M

Whitespace

Automotive	Revit LT	Auto CAD	AEC Coll...	Fusion 360	Forma	InfraWorks	BIM Collab...
EDA							
Financial Services							
Healthcare & Life Scie...							
Oil & Gas							

Propensity to Buy Which Products should we offer?

Revit LT	83.93%
InfraWorks	67.94%
AEC Collection	65.97%
Auto CAD	65.57%
Fusion 360	44.89%
BIM Collaborate Pro	44.29%
Forma	44.23%



Our AI-Driven Cloud Solutions

**\$XXX
Billion**

expected global
business revenue
impact of Salesforce
AI-powered cloud
solutions in 2028

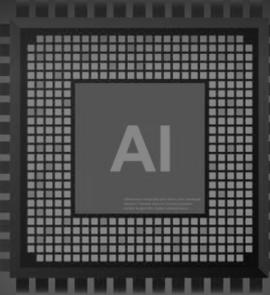
**\$XXX
Billion**

current global
business revenue
impact in 2022

**\$XXX
Trillion**

expected net gain
in business revenue
impact between
2022 and 2028

AI

A graphic of a square integrated circuit (chip) with a grid of pins on its sides. The letters 'AI' are prominently displayed in the center of the chip. The chip is set against a background of glowing circuit traces and small star-like light effects.

What is Your Current AI Adoption Stage?



Exploring AI



Developing AI Strategies



YOU ARE HERE



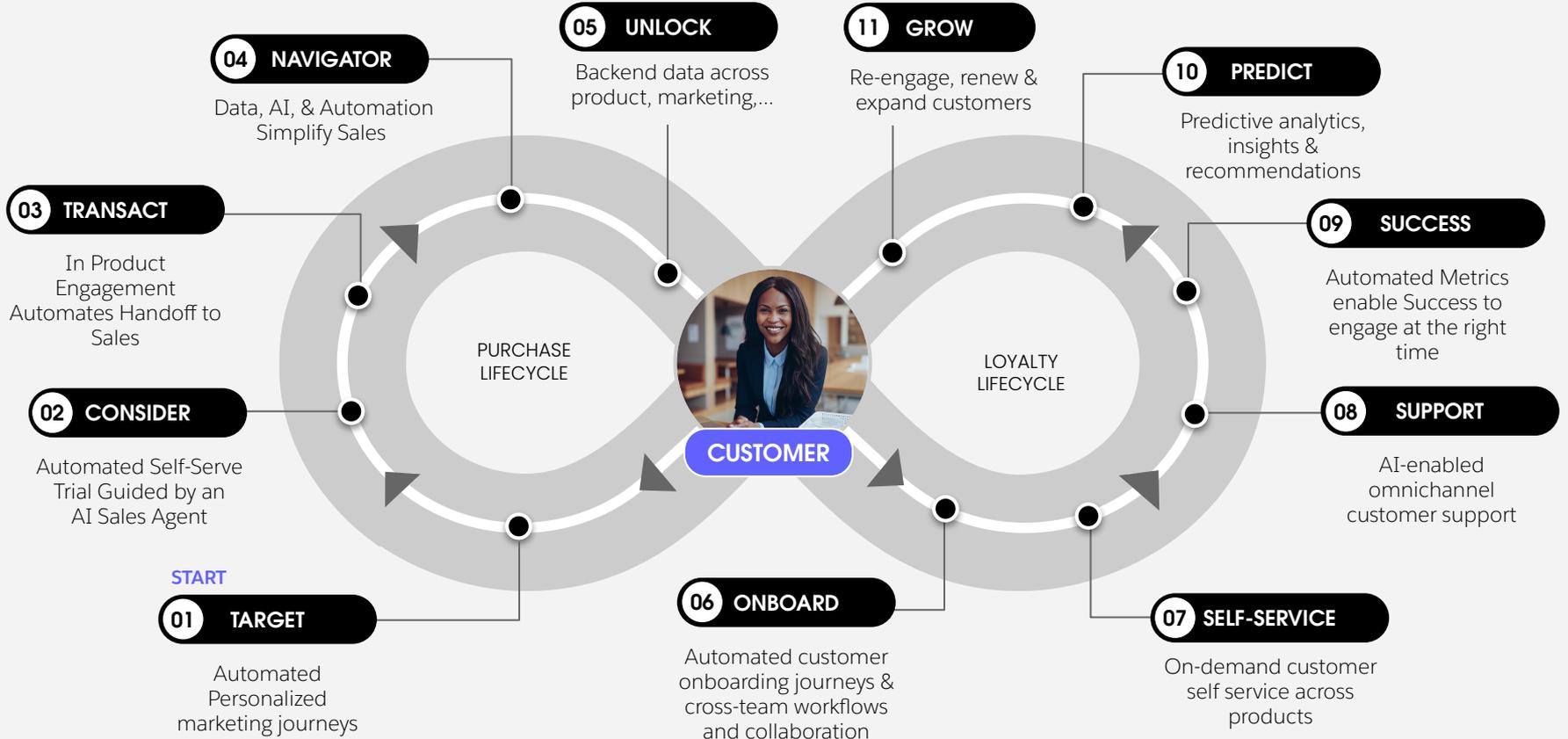
Implementing AI



Optimizing AI



Connected Journey Map



Sales Excellence Capability Map

Functional Capabilities



Foundational Capabilities

-  **Customer Centric Business Processes**
 -  Human-Centered Design
 -  Connected Experiences
 -  Personalized Experiences
-  **Leanest Possible Tech Stack**
 -  Business / IT Partnership
 -  Nimble Technology Strategy
 -  Democratized Technology and Delivery
 -  Modernized Architecture and Data
-  **Success Fundamentals**
 -  Lean Governance
 -  Human Centered Change
-  **One Team Aligned Around the Customer**
 -  Aligned Vision
 -  Employee Experiences
 -  Maximized Collaboration
 -  Empowered Employees
-  **Sense and Respond**
 -  Shared Insights
 -  Feedback Loops
 -  Activated Agility
 -  Culture of Learning

SALES EXCELLENCE OUTCOMES

↑ Sales Growth

↓ Operational Cost

↑ Retention

↑ Innovation

Data Excellence Maturity Curve

The Average Customer is Here

2.4

2: Emerging

Basic Framework

- Basic Entity definitions
- Simple customer lifecycle process
- Simple reporting and dashboards
- simple validations
- Core attributes standardized
- Governance Process Reviews at Business Domain level

1: Minimal

Getting Started

- Ad-hoc data entry
- No data capture controls
- No data governance oversight
- No data architecture standards

3: Performing

Customer Aware

- Clear Customer definition
- Data quality and Standards at Account/Contact level
- Implemented Account hierarchies
- Data is enriched by 3rd party data
- Complete Process Maps for customer data lifecycle
- Data Duplication prevention and monitoring
- Data Governance is part of COE and enforces standards
- Regulatory and Compliance mechanisms setup

But Wants to Be Here

4.7

4: Optimizing

Customer Unification

- Customer is reconciled and linked across records
- Complex entities with relational data is well managed
- Data architecture is aligned across orgs and systems
- Data quality metrics and impact are exposed across business domains
- Data is warehoused and accessible
- Performance is not impacted by large data volumes
- Data visibility and security is monitored
- Services for clean data capture are enabled
- An Individual entity is implemented and linked to Contacts, Leads & Acct's.

5: Leading

Full Customer 360

- Marketing leads customer-centric strategy to deliver personalized, differentiated experiences
- Continuous delivery of customer-centric, agile and responsive innovations through continued growth of data centric strategies
- Customer lifecycle is well defined and delivers rich experiences
- Measurement systems used consistently to produce individual-level insights and drive business planning decisions
- Full C360 is defined and enables all relevant business domains
- Data quality and governance does not impede business agility

How We Can Help



Our **AI Co-creation Workshop** is an opportunity to collaborate and align on what the **most important problems** to solve for on the future AI experience and **ideate on the best path forward** towards solutions.

This session creates a shared vision and ownership as it breaks down internal silos and gives all the voices necessary to a successful solution the opportunity to shape it—in doing so, they'll fight for its success when it counts.

Connected Vision
One to two paragraphs that call out key aspects of what will be transformed in terms of both the user experience, processes, capabilities, and more—based on what was captured from the workshop and/or additional customer inputs.
 strive for clear, concise and jargon free language.

Guiding Principles
A set of 9 guiding principles that define the vision and provide a framework for decision-making.

Key Findings (1 of 2)
A list of key findings that identify the current state and the future state of the organization.

Transformation Considerations
A grid of considerations for the transformation, including Quality, Scope, Time, and Risk.

Transformation Readiness
A grid of readiness indicators for the transformation, including Business, People, and Technology.

Salesforce Professional Services Proposal
Accelerating vision-to-value for [Client Name].
A detailed proposal for Salesforce Professional Services, including a timeline and a list of services.

Proven ROI with ProServ...
We have hard numbers backed up by Forrester to show how Professional Services drive success

XX% **XX%**

Reduction in Rework and Refactoring Costs of Customers **Reduced Technical Debt**

XX% **XX%**

Increase in Project Success of Customers **Reduced Long-term Operations/ Mgmt. Costs**

*The Total Economic Impact™ Of Salesforce Professional Services, a commissioned study conducted by Forrester Consulting on behalf of Salesforce, February 2024.

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Thank You.