

The “C” Level View of CRM

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Forward-Looking Statements

Statement under the Private Securities Litigation Reform Act of 1995:

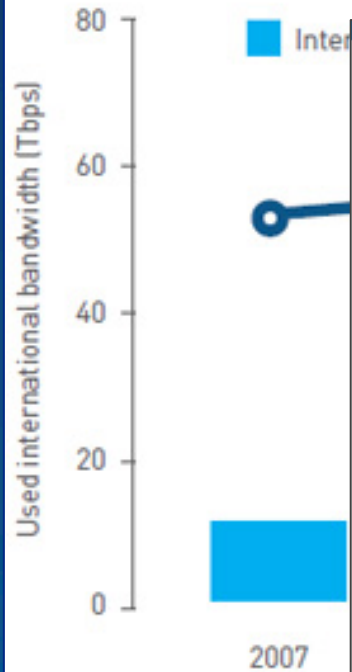
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It Took a While...But We Have Connected the Planet

Global international bandwidth growth between 2007 and 2011



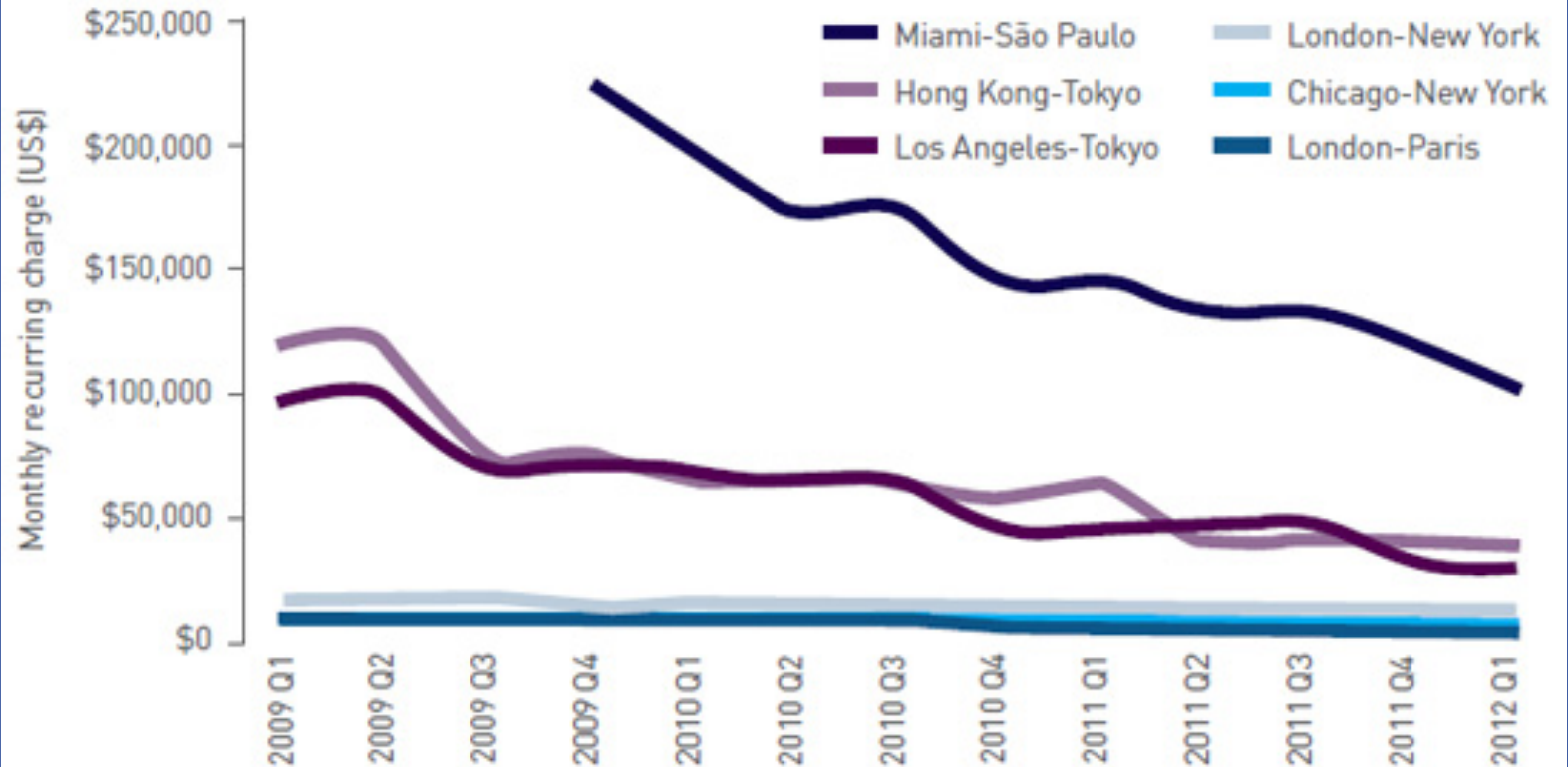
TeleGeography **25 Years** APRIL 23, 2015
RESEARCH UPDATE

Global Network

New data from TeleGeography shows that used international bandwidth grew 44% in 2014 and is comparable to the growth seen in 2013.

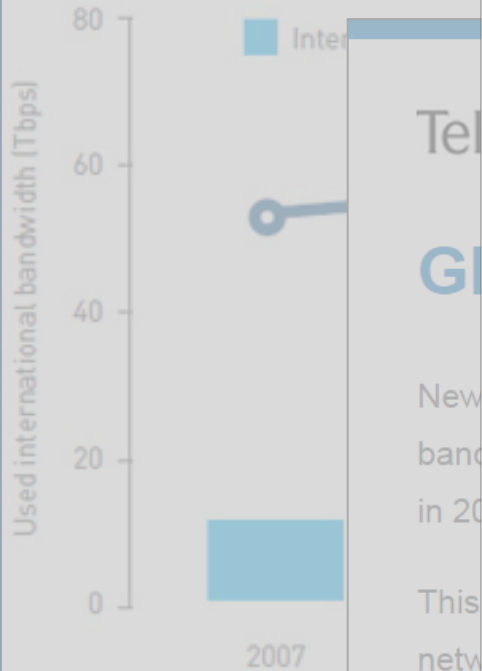
This rapid capacity growth is driven by new network capacity, particularly in international bandwidth. Consequently, network content providers are seeing a decline in bandwidth costs.

Median 10Gbps price trends on major international routes between Q1 2009 and Q1 2012



It Took a While...But We Have Connected the Planet

Global international bandwidth



TeleGeography 

JULY 28, 2015

RESEARCHUPDATE



Global Mobile Subscribers Surpass 7 Billion

New data from TeleGeography's [GlobalComms Database](#) reveal that global mobile subscribers have reached 7.1 billion, up from just seven million in 1989, and that the number of mobile lines in service will surpass the world's population later this year. Even so, regional differences in wireless penetration and subscriber composition leave significant opportunity for growth in some areas.

Asia is home to 3.7 billion mobile subscribers, and continues to fuel global growth. Between Q1 2014 and Q1 2015, Asia added 194 million subscribers, or over 60 percent of net new global wireless subscribers. Still however, the Asian mobile market is far from saturated, as there are over 270 million people without a cell phone. China and India alone account for 2.3 billion subscribers, but while China has emerged as a meaningful 4G market with 162 million LTE subscribers, 90 percent of Indian mobile subscribers remain on 2G networks, driving the region's ongoing reliance on the legacy technology.

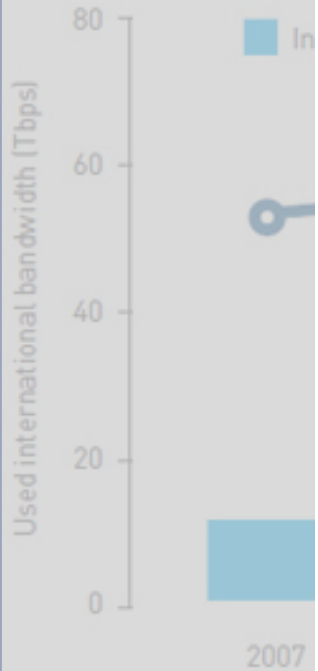
2009 and Q1 2012

London-New York
Chicago-New York
London-Paris

2011 Q3
2011 Q4
2012 Q1

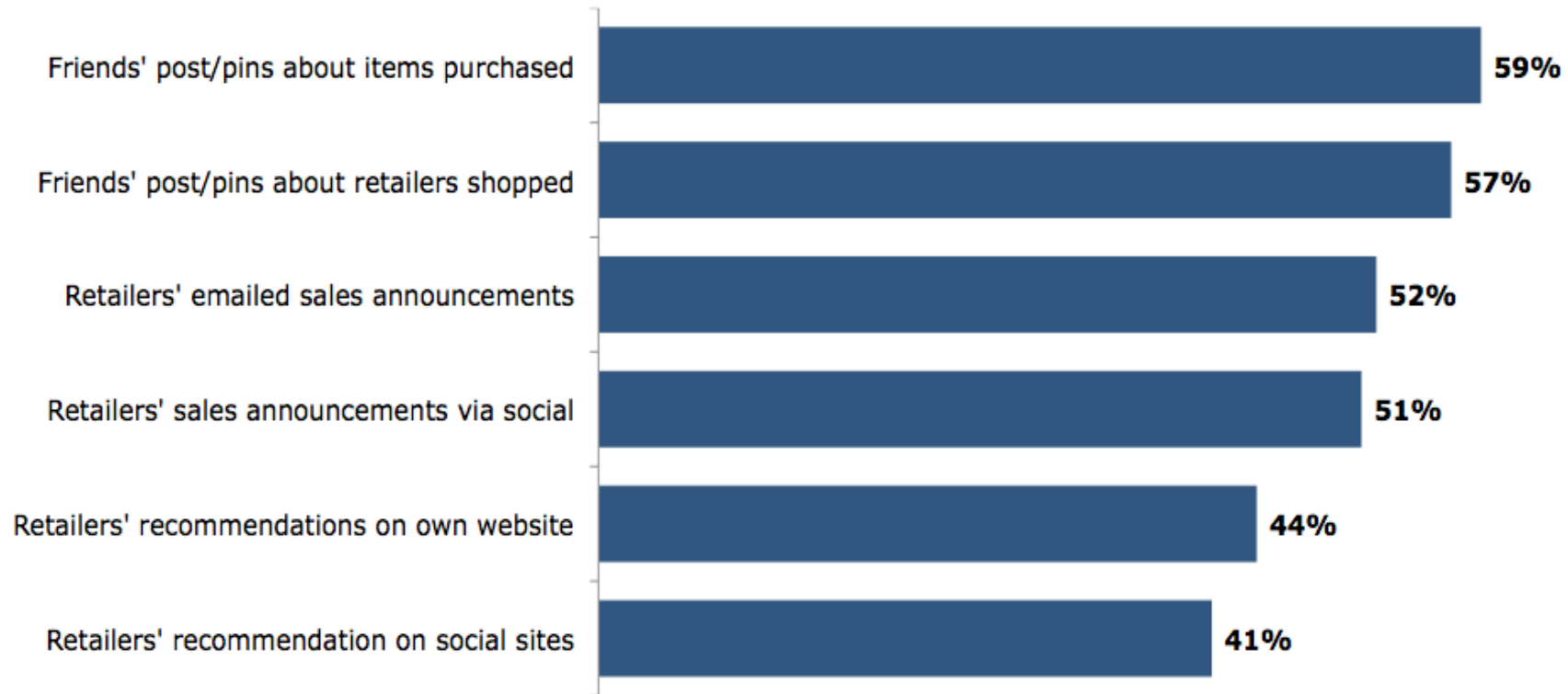
It Took a While...But We Have Connected the Planet

Global international



Global Consumers' Purchase Behavior Influencers

% of respondents
March 2014



MC MARKETINGCHARTS.COM

Source: IBM Institute for Business Value

2012

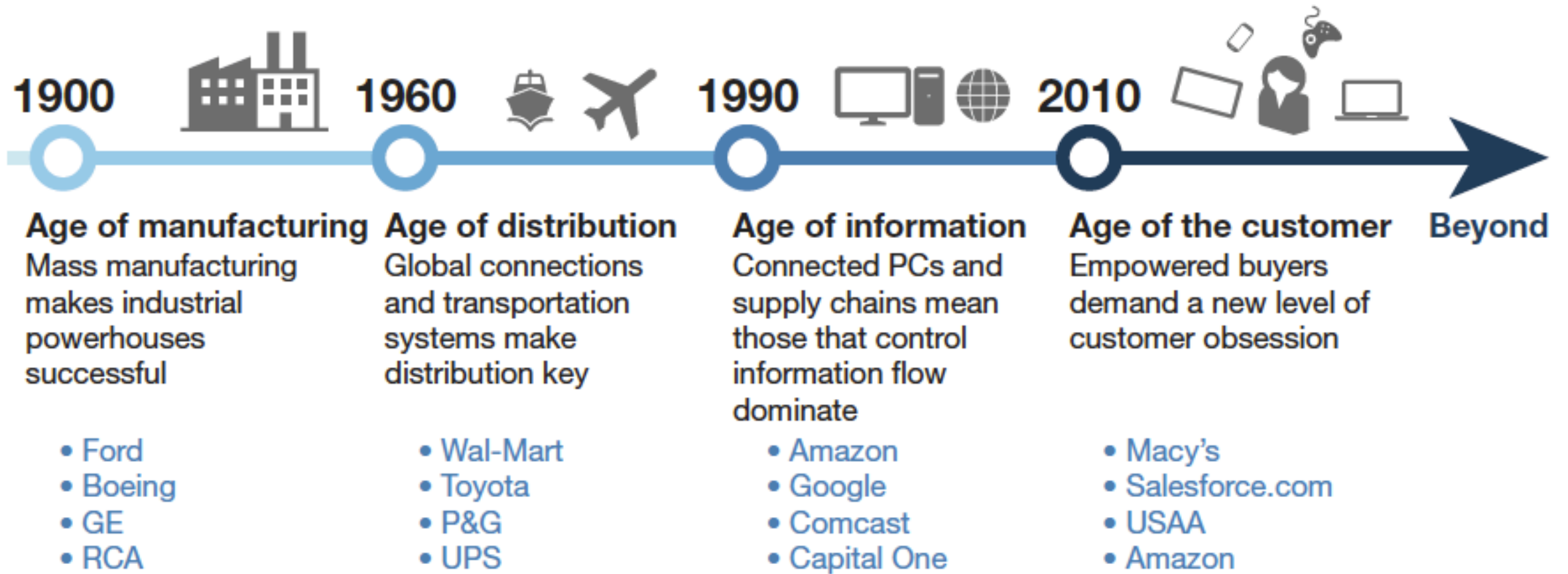
NY

NY

IS

2012 01

We have entered the Age of the Customer




The Age of the Customer


Everything and everyone is connected




Mainframe




SNA




Terminal



Server



LAN/WAN



Client



- Cloud
- Mobile
- Social
- Data Science
- IoT



Thousands



Millions



Billions
of connected things



Trillions
of customer interactions



Connect With Your Customers in a Whole New Way



Connected Apps & Products



Connected Communities



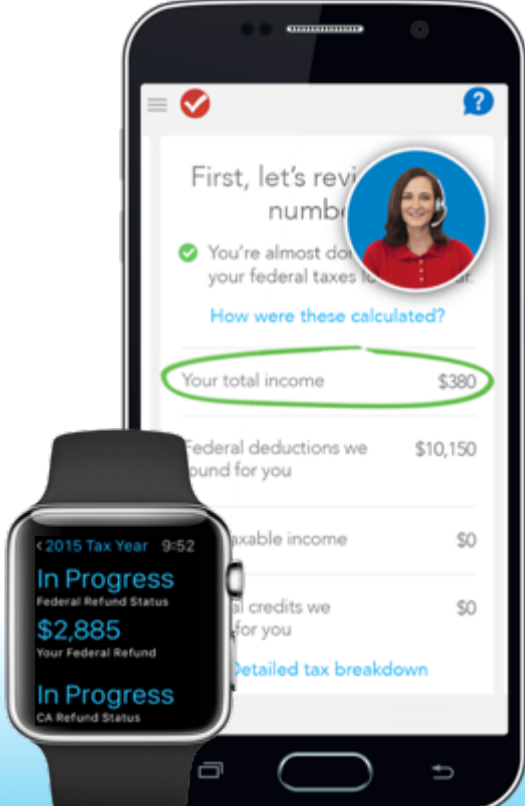
Connected Partners



Connected Employees



Connected Customer 360



+66% faster resolution time



Run Your Business From Your Phone

6B+
smartphones
by 2020



Build 1-to-1 Customer Journeys

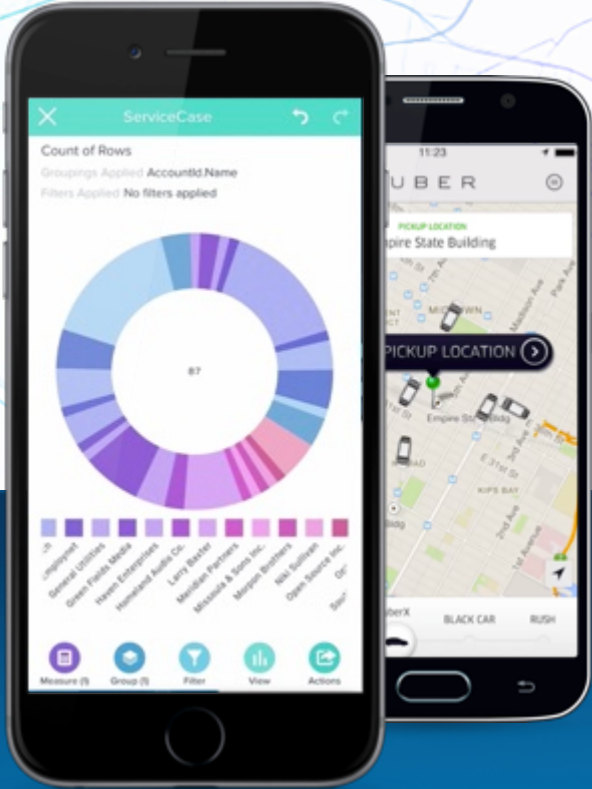


75B
Connected products
by 2020



Make Everyone and Every Thing Smarter

Get smarter about your customers



90%
of world's data created
in last 12 months



Predictive
analytics

Machine
learning

Artificial
intelligence

Global CRM Leader



7 industry leading apps.
1 platform.

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The Gartner documents are available upon request from Salesforce.

Sales Cloud

Gartner. A Magic Quadrant Leader for Sales Force Automation
Gartner "Magic Quadrant for Sales Force Automation," by Rob DeSisto, Tad Travis, 7.9.15

 IDC #1 Marketshare in Sales Automation Applications, 2014
IDC's Worldwide Semiannual Software Tracker, June 2015

Service Cloud

Gartner. A Magic Quadrant Leader for the CRM Customer Engagement Center
Gartner "Magic Quadrant for the CRM Engagement Center," Michael Maoz, Jim Davies, 4.27.15

 IDC #1 Marketshare in Customer Service Applications, 2014
IDC's Worldwide Semiannual Software Tracker, June 2015

Marketing Cloud

Gartner. A Magic Quadrant Leader for Digital Marketing Hubs
Gartner, "Magic Quadrant for Digital Marketing Hubs," Andrew Frank et al, 1.5.16

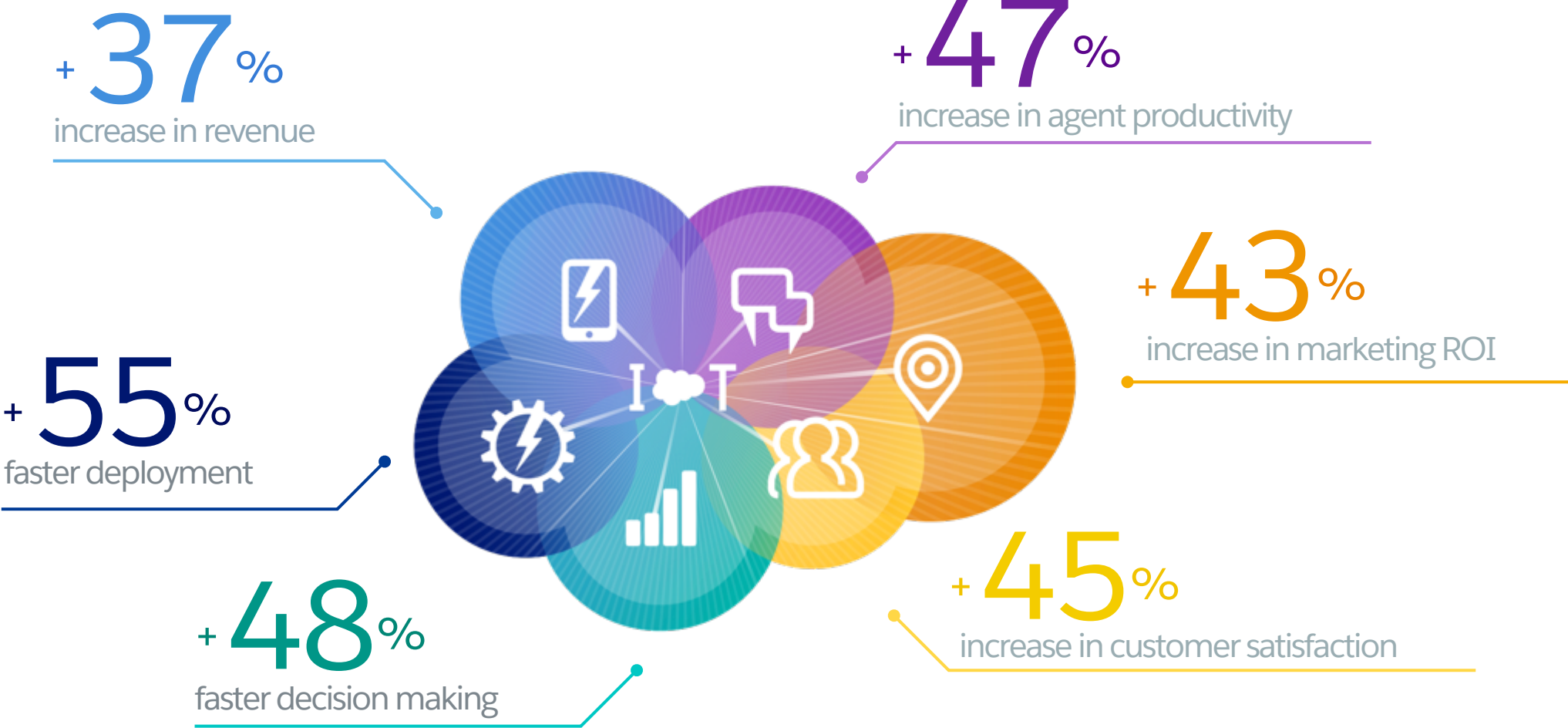
Community Cloud

Gartner. A Magic Quadrant Leader in Horizontal Portals
Gartner "Magic Quadrant for Horizontal Portals," Jim Murphy, Gene Phifer, Gavin Tay, Mangnus Revang, 9.11.15

App Cloud

Gartner. A Magic Quadrant Leader for Enterprise Application Platform as a Service
Gartner, "Magic Quadrant for Enterprise Application Platform as a Service, Worldwide" Yefim Natis, et al. 3.24.15

Customer Success Platform in Action



Average Percentage Improvements Reported by Salesforce Customers

Source: Salesforce Customer Relationship Survey conducted March 2015 - May 2015, by an independent third-party, Confirmit Inc., on 4,600+ customers randomly selected. Response sizes per question vary.



Connection...and Competition

Category Competitors:

- Recognized by customers and prospects
- Defined by comparable capital assets
- Bigger threaten with scale; Smaller th

Connection Competitors:

- Discovered by customers and prospects
- Defying category definitions with life
- Empowered by data across multiple

Who's Your Competitor Now?

- If none of Google/Amazon/Apple/PayPal/Square are on your list, **you need a longer list...**
...and you need to ask, “What would put us on *their* lists?”



Connection...and Competition

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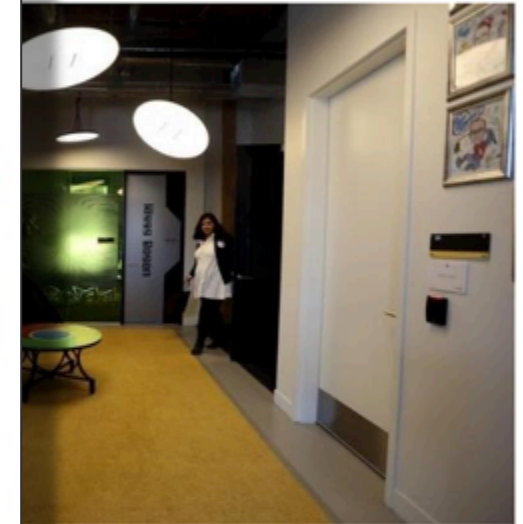
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ers in Kitchener-Waterloo, Ontario January 14, 2016.

Google (GOOGL.O) as a potential threat because of customer data, a report released on Tuesday said.

consumers may bypass traditional insurers for "new, technology Capgemini's annual world insurance report said.

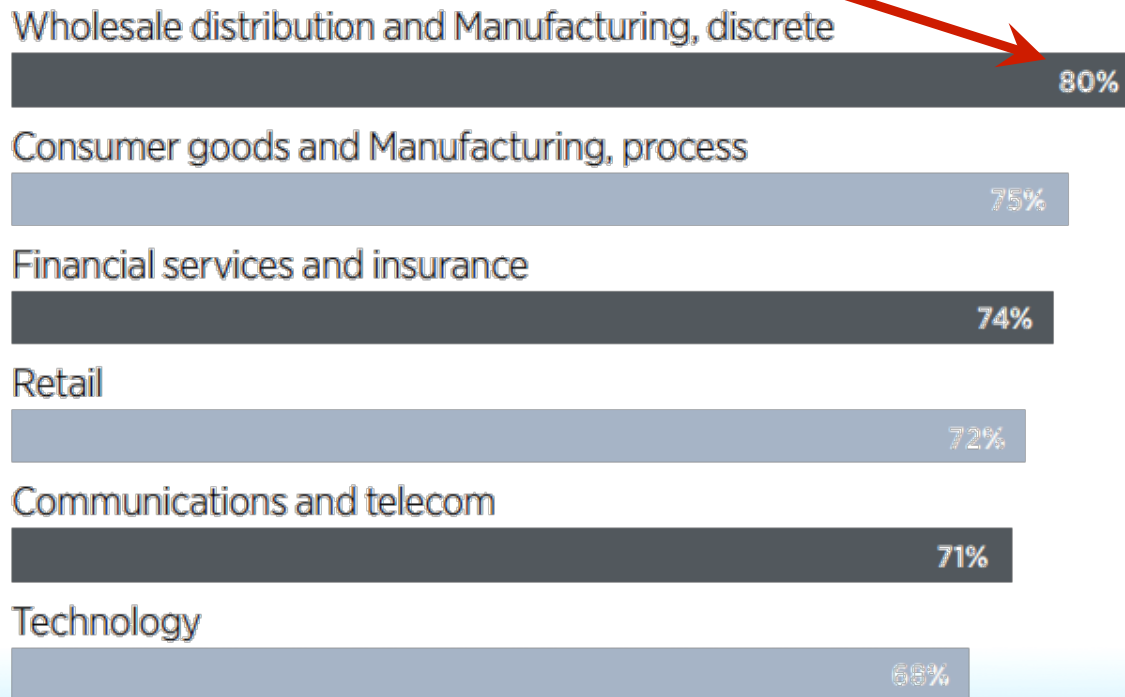
ed a longer list...

Companies Overestimate User-Experience Leadership

We can't *all* be above average

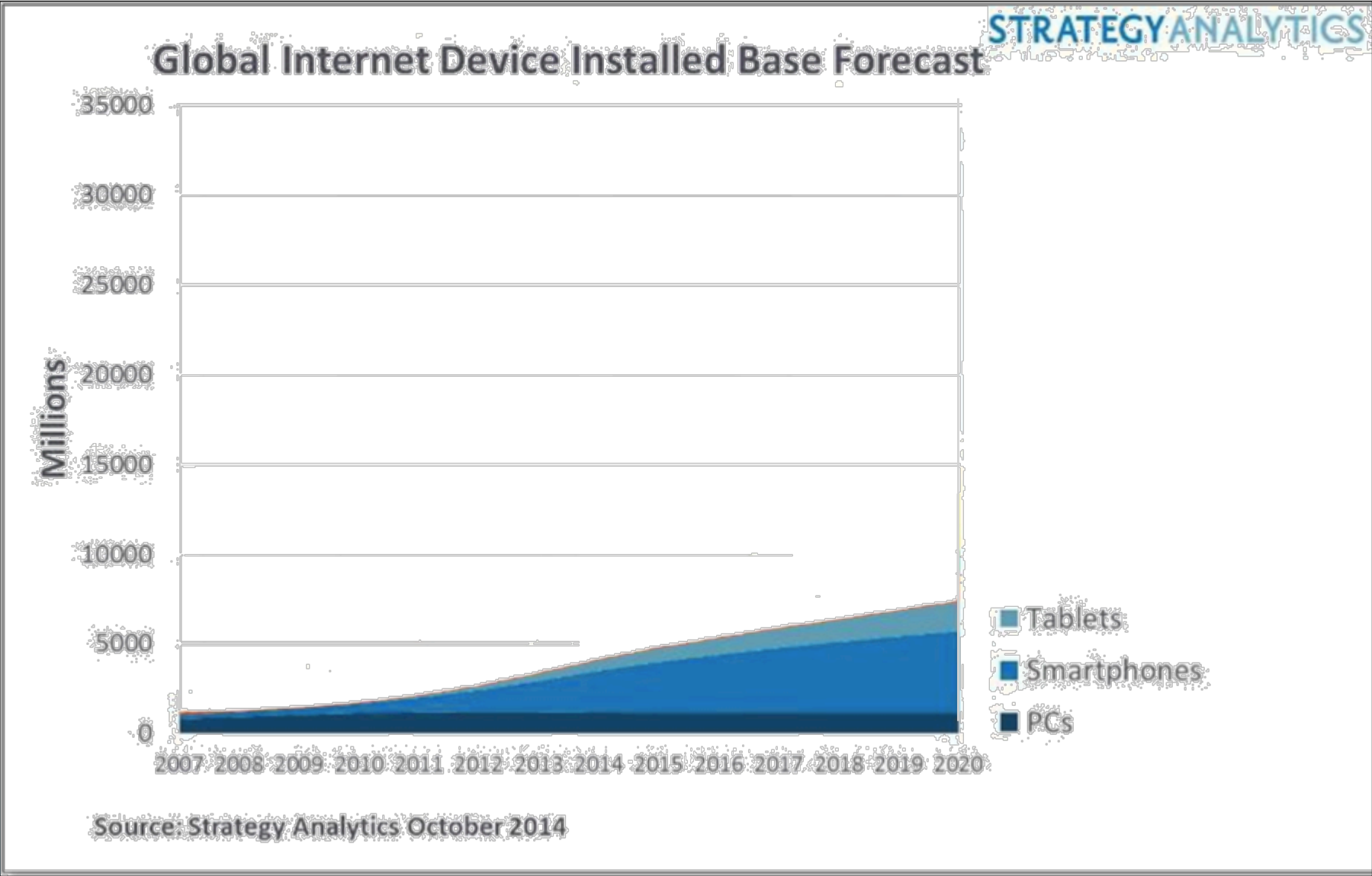
Figure 2 How do you believe the customer service in your company performs compared to your peers?

Doing better or significantly better than peers

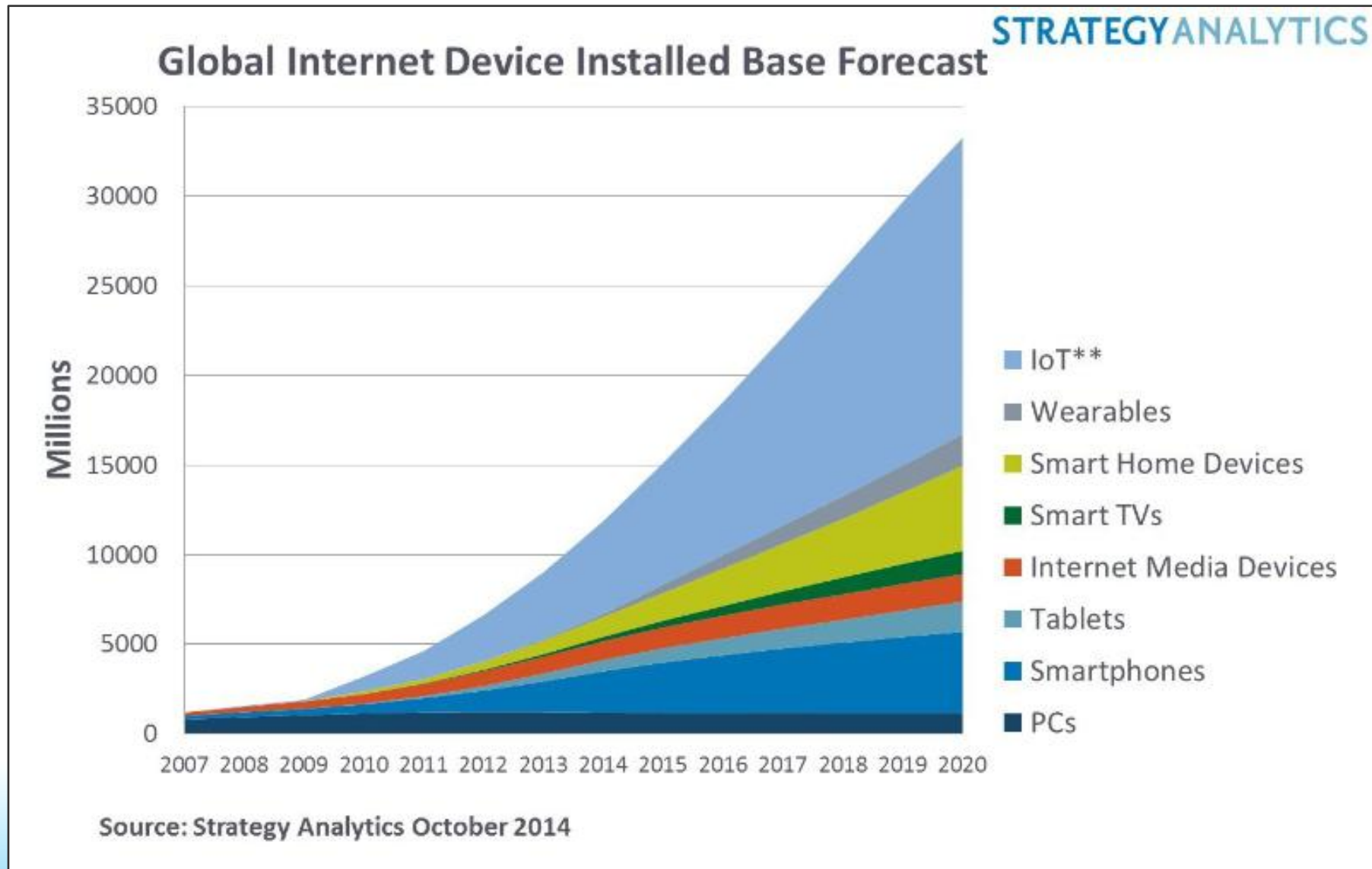


Modern Customer Service
January 2015

Today's Devices Merely Enable Tomorrow's Experiences



Today's Devices Merely Enable Tomorrow's Experiences



Gartner's Top 10 Predictions 2016+

1. By 2018, 20 percent of business content will be authored by machines.
2. By 2018, six billion connected things will be requesting support.
3. By 2020, autonomous software agents outside of human control will participate in five percent of all economic transactions.
4. By 2018, more than 3 million workers globally will be supervised by a “robo-boss.”
5. By year-end 2018, 20 per cent of smart buildings will have suffered from digital vandalism.
6. By 2018, 45 percent of the fastest-growing companies will have fewer employees than instances of smart machines.
7. By year-end 2018, customer digital assistant will recognize individuals by face and voice across channels and partners.
8. By 2018, 2 million employees will be required to wear health and fitness tracking devices as a condition of employment.
9. By 2020, smart agents will facilitate 40 percent of mobile interactions, and the post-app era will begin to dominate.
10. Through 2020, 95 per cent of cloud security failures will be the customer's fault

Today's Customer Demands That You Ask New Questions

Media and Entertainment

Community-created content; on-demand viewing; multi-screen experiences...

What's still urgent?

Manufacturing and Logistics

Dynamically match demand with "free" capacity; 3D-print (former) inventory...

What's worth owning?

Health Care and Elder Care

Gatekeepers lose power; payment only for results; elderly = growth market...

What differentiates?

Financial Services

The asset-light don't borrow to buy big; the data-rich don't pay just to play...

What has value?

Healthcare is Shifting Toward the Patient



Clinical Innovation

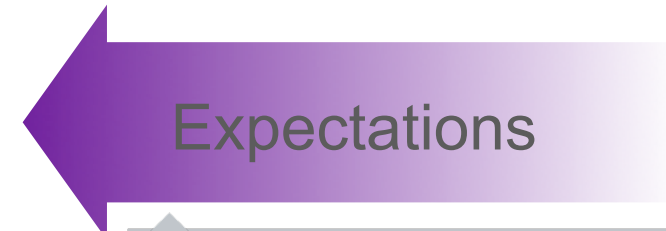


Regulation

Affordable Care Act (ACA)

\$17B

Chronic Care Management (CCM)
Medicare bonus estimate for 2015



Expectations

78%

unsatisfied with U.S. healthcare system*

71%

of millennials expect to use
a mobile app to manage health**

*Deloitte Survey of US Health Consumers

**Salesforce Connected Patient Report

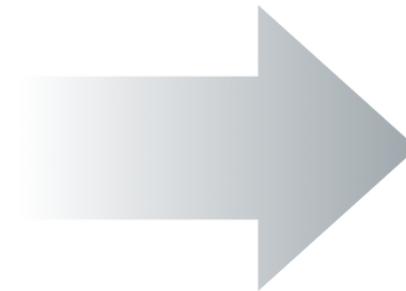
Future of Healthcare: Deeper Relationships





Salesforce Drives Patient Satisfaction

Care Coordinator Productivity	Faster Case Resolution	Increase in Retention	Decrease in Support Costs
+ 43%	+ 44%	+ 44%	- 44%



+ 44%
Patient Satisfaction

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Top Healthcare Companies Driving Relationships With Salesforce

Before Care



Johns Hopkins

Seamless care coordination for global patients to enable a personalized, high-touch patient experience

Improved lead conversion rate by 60%

During Care



American Addiction Centers

Manages entire patient lifecycle from acquisition, risk assessment to discharge

Rescued and admitted 3X patient daily without additional FTE

After Care



City of Hope

Complete patient view in call centers allows for personalized patient interactions

Handles 1M more calls annually without additional FTE's

Massive Industry Shift Towards The Customer

Customer Demand For Speed



Faster launches
Faster Customer Acquisition
Faster Growth



Industry Push Towards Customer

Rise of Internet of Things
Faster Competition
Faster Technology Changes



Become a Customer Company

Connect Manufacturing in a Whole New Way, Go Faster





Inquire to Order



Service Excellence



Connected Products

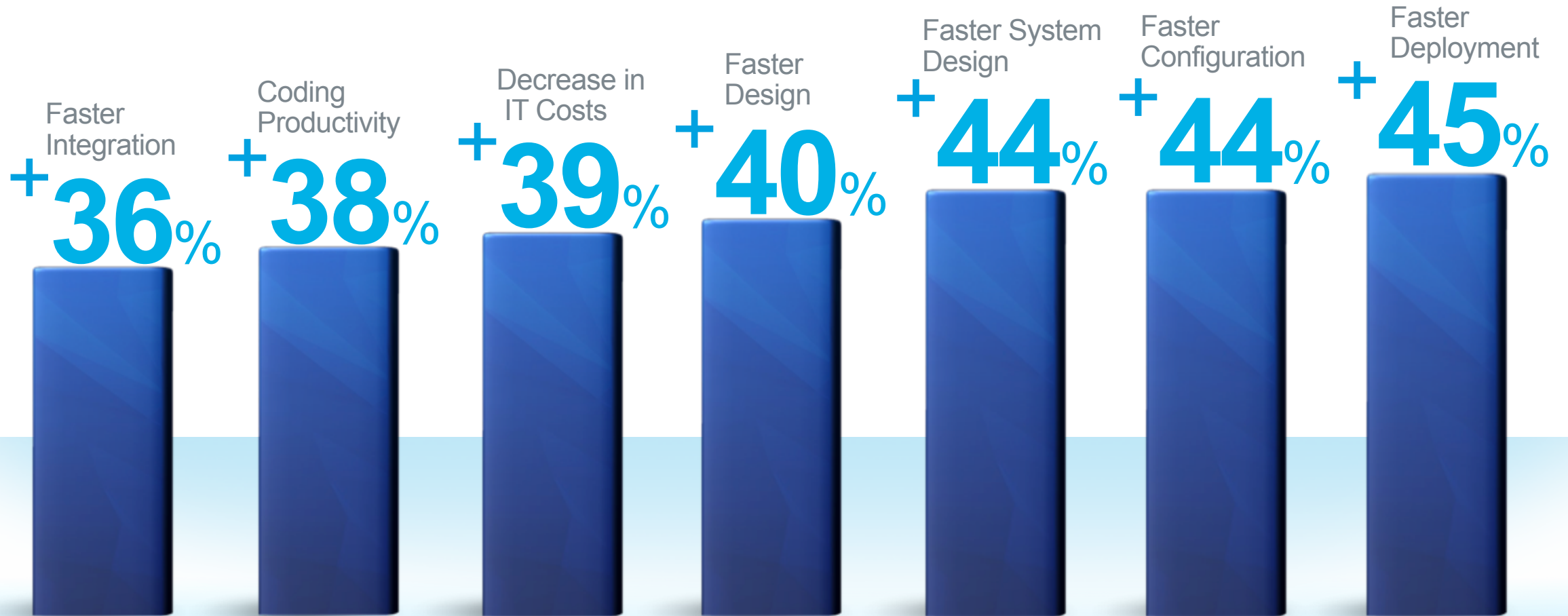


Customer Success Platform for Manufacturing



Unlock ERP

The Fastest Path from Idea to App



Average Percentage Improvements Reported by Salesforce Manufacturing Customers

Source: Salesforce Customer Relationship Survey conducted March 2014 - May 2014, by an independent third-party, Confirmat Inc., on 4,100+ customers randomly selected. Response sizes per question vary.

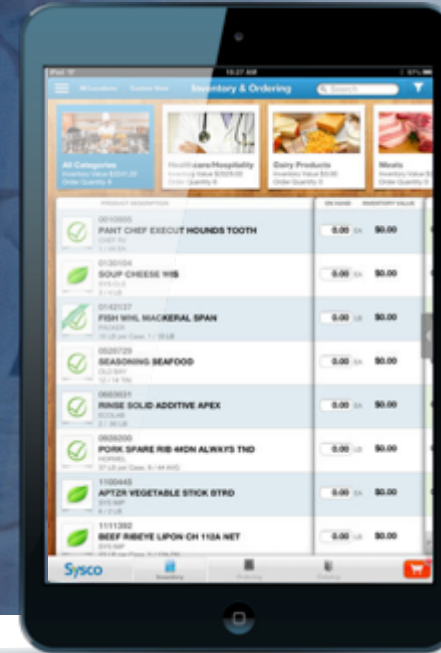


“Salesforce delivers for us.”

- Wayne Shurts, CTO



salesforce | platform



Sysco Transforms Drivers into Sales with Mobile Apps

Drivers manage deliveries and take orders on the go

Salesforce & SAP integration for order management

Mobile, social intranet and HR applications let employees collaborate in real-time

“With IoT Cloud our connected devices will tell us when it’s time for a service call ”

Todd Finders, CIO, Emerson Climate Technologies



Emerson connected comfort solutions provide control, insight & automation

Emerson Climate Technologies provides global solutions to improve human comfort. This includes thermostats and climate controls for both residential and commercial use.

They provide continuous monitoring, problem identification, preventative maintenance, proactive alerting, and customer lifecycle management

Device data is used for preventative service opportunities to connect homeowners and certified installation contractors when service need arise or there are additional products and services offers

Massive Gap Between Governments & Customers

Customers

Expectation Gap

72%

Unsatisfied

Governments

Trust Gap

75%

Don't Trust

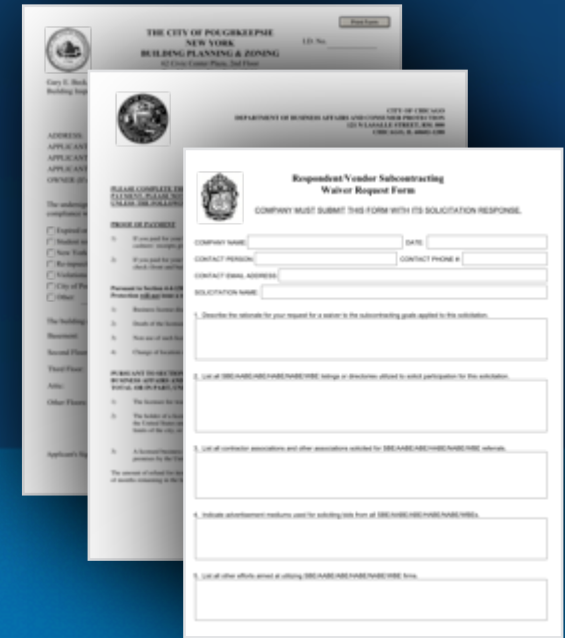
Innovation Gap

94%

IT Failure Rate



There's an **App**
for that



There's a **Form**
for that

Become a Connected Government

Connect with your customers in a whole new way



“Before MuleSoft and Salesforce, we were processing 30,000 applications per month with a \$30 million annual personnel budget. Now, we are able to process 60,000 applications per month with the same \$30 million annual budget.”

Antoinette Taranto, Chief Customer Officer, Colorado PEAK



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Use Case: Case Management, Cloud App Development

Colorado PEAK increases citizens self-sufficiency for Public Assistance

Colorado is experiencing increased enrollment rates for food, cash, and medical assistance programs

PEAK portal enables citizens to apply for welfare benefits online

Increased outreach and accessibility to benefits with **no assistance required**

Reduced data entry for employees yielding up to **9 times** more applications processed **daily**

“Optimizing this internal process is a benefit not only to our agency, but to the taxpayers at large.”

Wallace Wilhoite, Manager, Network Forensics

Department of
Health and Human
Services



salesforce | platform <remedyforce

Use Case: Engagement Center

DHHS Engages Employees with Secure, Social IT Help Desk

Internal IT Service Desk serving employees of the DHHS

Automated **workflow & approvals**, complex **case escalation** & documentation, **change management** tools

Compliant with all mandated **security standards**, including FedRAMP & ITIL

Immediate ROI, improved productivity & agility

- Launched in **3 months**
- **\$125-200K** saved over 3 years

\$100M Agency-wide BPA – March 2016



The new Financial Services



“Capital One plans to reduce its 8 data centers to 3 by the end of 2018 by moving to Amazon’s AWS “

Rob Alexander, CIO Capital One



“Over the next 10 years, we will see a number of significant disruptions in financial services — let’s call them Uber moments — driven by companies in the Fintech sector... “

Antony Jenkins, ex-CEO Barclays



At Super Bowl SunTrust launches the movement onUp. “A catalyst inspiring people to make a personal commitment to improve their financial health”

William H. Rogers, Jr., CEO SunTrust

Goldman Sachs

\$4.7T in revenue for traditional financial services at risk of being displaced by new technology-enabled entrants

Effortless Customer Experiences at Scale for FINSERV



“With Salesforce, we can adapt faster, act smarter and achieve better outcomes.”

Steve Weston, CEO, Barclays Mortgages



Mortgage applications made simple with Salesforce

60% of Barclays mortgages are arranged through 16,000 external brokers

Launched first broker community of its kind using Salesforce Communities

Transformed engagement with brokers and customers

Status of thousands of mortgage applications now visible via the community platform

“Service Cloud shines a light on the top customer issues.”

Tom Sedlack, VP of Cloud and Collaboration



SunTrust Drives Loyalty by Decreasing Customer Complaints

- 1 of the largest financial services holding companies
- Managing 3K complaints & 9K feedback/month
- Unable to capture top 10 customer complaints in disconnected systems

- Reduction in customer complaints by 50-95%
- Single platform to highlight top complaints for executives
- React quicker to business & customer needs

The Salesforce Platform Connects Everything

Share data and take action across all apps

Salesforce Apps

Apps we build and maintain



Your Apps

Apps you build on App Cloud



AppExchange Apps

Pre-built apps that run on App Cloud



Shared Identity, Network, and Data



Free online interactive training for everyone! Bring developers, IT, and business together.



www.trailhead.salesforce.com



>2 Million Members



The Salesforce logo, which consists of a blue cloud shape with the word "salesforce" written inside in white lowercase letters.

salesforce

Thank you