

Building a 360-Degree Customer View with Salesforce Data Cloud

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Abstract:

The exponential growth of digital platforms has led to the generation of vast amounts of customer data across multiple channels. However, this data is often fragmented across disparate systems, making it difficult for organizations to derive meaningful insights.

Salesforce Data Cloud emerges as a powerful solution to unify customer data and enable a comprehensive Customer 360 view. This paper provides an in-depth analysis of Salesforce Data Cloud, its architecture, functionalities, and its role in building a unified customer profile. It further explores real-world applications in sales optimization, discusses implementation challenges, and highlights future advancements. The study concludes that Salesforce Data Cloud significantly enhances organizational capabilities in delivering personalized customer experiences and improving decision-making.

Keywords: Salesforce Data Cloud, Customer 360, CRM, Data Integration, Real-Time Analytics, Personalization, Cloud Computing.

I. Introduction

In the modern digital era, customers interact with organizations through multiple touchpoints including websites, mobile applications, social media platforms, emails and customer support channels. Each interaction generates valuable data, contributing to the overall understanding of customer behavior. However, this data is typically stored in isolated systems, leading to fragmented insights and inefficiencies in customer relationship management.

Organizations face significant challenges in integrating these diverse data sources to create a unified customer profile. Without a consolidated view, businesses struggle to deliver personalized experiences, optimize sales strategies, and maintain customer satisfaction.

The concept of Customer 360 addresses this issue by providing a holistic view of customers, combining data from all touchpoints into a single unified profile. Salesforce Data Cloud plays a critical role in enabling this transformation by offering real-time data integration, advanced analytics, and scalable cloud infrastructure.

This paper explores the role of Salesforce Data Cloud in building a 360-degree customer view, focusing on its architecture, functionalities, use cases and impact on sales performance

II. Background and Literature Review

The concept of Customer Relationship Management (CRM) has evolved significantly over the years. Traditional CRM systems focused primarily on storing customer data and managing interactions. However, with the rise of big data and cloud computing, modern CRM systems emphasize real-time analytics, personalization, and predictive insights.

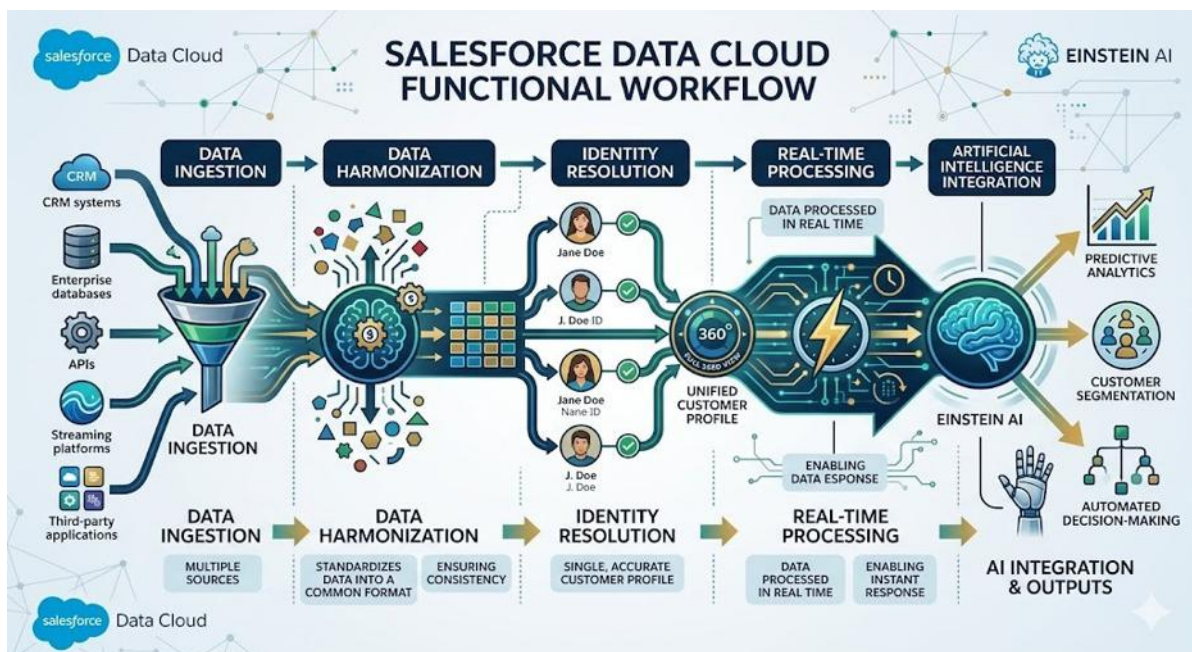
Recent studies highlight the importance of Customer Data Platforms (CDPs) in enabling Customer 360. CDPs integrate data from multiple sources, providing a unified and consistent customer profile. Research indicates that organizations leveraging CDPs experience improved customer engagement, higher retention rates, and increased revenue.

Salesforce Data Cloud represents a next-generation CDP that combines real-time data processing, artificial intelligence, and scalable cloud infrastructure. Unlike traditional systems, it enables dynamic data updates and advanced analytics, making it a powerful tool for achieving Customer 360.

Despite its advantages, there is limited research on its practical implementation in sales environments. This paper aims to bridge this gap by providing a comprehensive analysis of Salesforce Data Cloud and its applications.

III. Salesforce Data Cloud Overview

Salesforce Data Cloud is a real-time data platform designed to unify customer data from various sources and enable advanced analytics.



A. Key Features

1. Data Ingestion:

Salesforce Data Cloud supports scalable data ingestion from a wide range of structured and unstructured sources. These include CRM systems, enterprise databases, APIs, streaming platforms, and third-party applications such as marketing and e-commerce tools. The platform enables both batch and real-time data ingestion using connectors and APIs, ensuring seamless integration across systems. It also supports incremental data loading, allowing efficient processing of only updated records, thereby reducing latency and improving performance.

2. Data Harmonization:

Data harmonization ensures that data from diverse sources is standardized into a common format. Salesforce Data Cloud applies transformation rules, schema mapping, and normalization techniques to align

inconsistent data structures. This includes standardizing formats (such as dates and currencies), cleaning duplicate or incomplete records, and mapping different field names into a unified schema. This process ensures data consistency and enables accurate analytics and reporting.

3. **Identity Resolution:**

Identity resolution enables the creation of a unified customer profile by merging fragmented records from multiple systems. Salesforce Data Cloud uses both deterministic matching (based on exact identifiers like email or phone number) and probabilistic matching (using machine learning algorithms) to identify duplicate records. This results in a “golden record,” which serves as a single source of truth. It also supports cross-device tracking and continuous profile updates as new data is ingested.

4. **Real-Time Processing:**

The platform processes data in real time, allowing organizations to respond instantly to customer interactions. Streaming data and event-based triggers enable immediate updates to customer profiles and activation of workflows. This capability supports real-time personalization, proactive engagement, and faster decision-making, such as sending targeted offers based on live customer behavior.

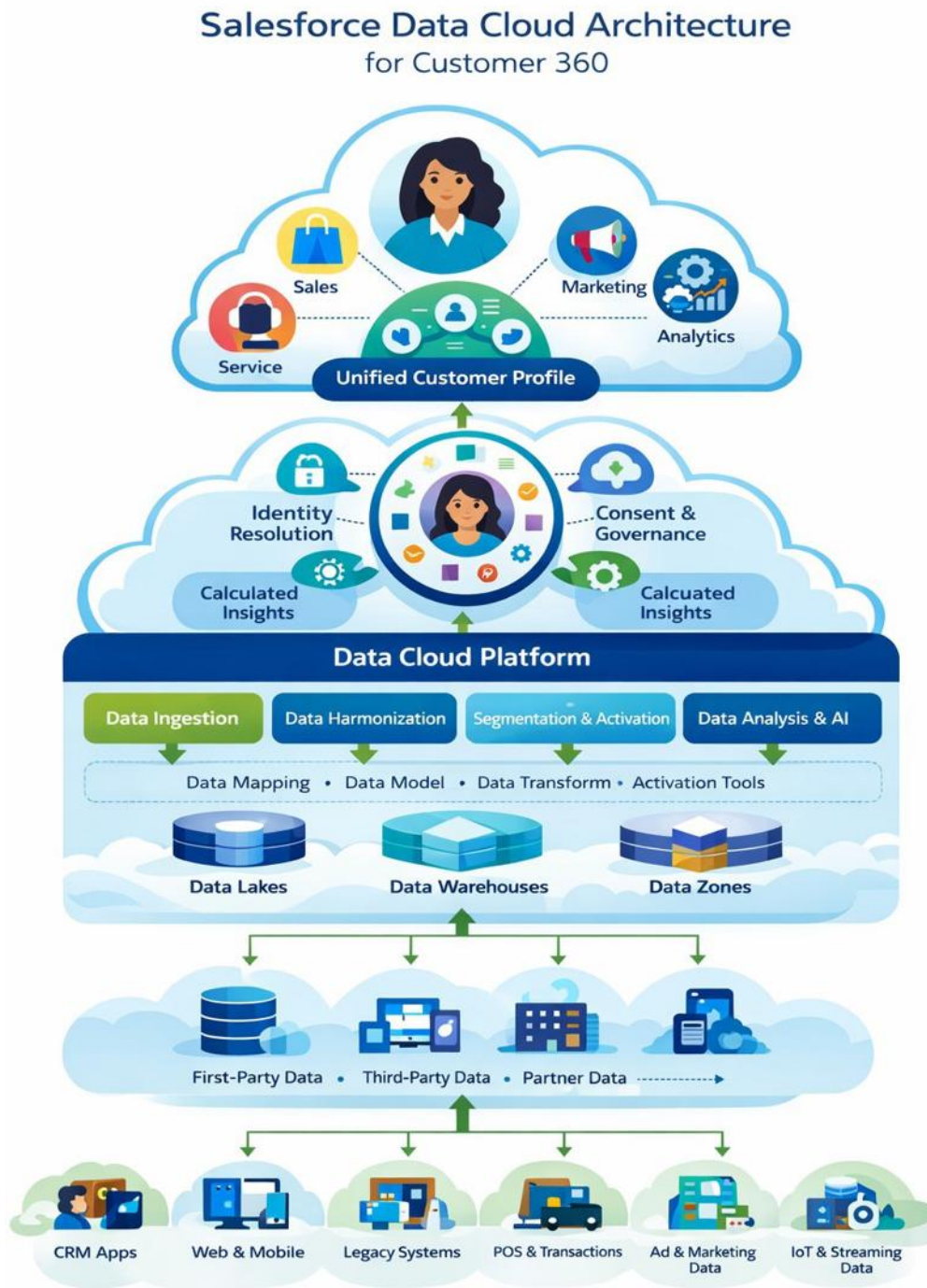
5. **Artificial Intelligence Integration:**

Salesforce Data Cloud integrates AI and machine learning capabilities to generate actionable insights. It supports predictive analytics, customer segmentation, recommendation systems, and automated decision-making. AI models continuously learn from incoming data, improving accuracy over time. Integration with intelligent tools enables businesses to anticipate customer needs, enhance personalization, and optimize sales and marketing strategies.

6. Overall, these features work together to transform raw, fragmented data into a unified and intelligent Customer 360 view, enabling organizations to deliver enhanced customer experiences and improved business outcomes.

IV. Architecture of Salesforce Data Cloud

The architecture of Salesforce Data Cloud consists of multiple layers that work together to create a unified customer view.



A. Data Sources Layer

This layer includes all sources of customer data and represents the foundation of the entire system. Data originates from multiple touchpoints where customers interact with a business, both online and offline.

Key sources include:

- **CRM systems:** Store structured customer information such as contact details, purchase history, and

communication logs.

- **Websites and mobile apps:** Capture behavioral data like page views, clicks, session duration, and user preferences.
- **Social media platforms:** Provide insights into customer sentiment, engagement, and brand perception through likes, shares, comments, and mentions.
- **IoT devices:** Generate real-time data from connected devices (e.g., wearables, smart home devices), offering contextual and usage-based insights.
- **Transactional systems:** Record purchase data, payment history, subscriptions, and order details.

This layer is critical because the quality, variety, and volume of incoming data directly influence the effectiveness of downstream processes.

B. Data Ingestion Layer

The data ingestion layer is responsible for collecting and importing data from all source systems into the platform. It ensures a smooth, reliable, and scalable flow of data.

Key capabilities include:

- Integration using **APIs, connectors, and ETL/ELT tools**
- Support for both **batch processing** (scheduled data loads) and **real-time streaming** (instant updates)
- Handling structured, semi-structured, and unstructured data formats
- Data validation and initial filtering to remove corrupt or irrelevant records

This layer acts as the gateway, ensuring that data is captured efficiently without loss or delay.

C. Data Harmonization Layer

In this layer, raw data is processed to ensure consistency and usability across the platform. Since data comes from multiple sources, it often contains inconsistencies, duplicates, or formatting issues.

Key processes include:

- **Data cleaning:** Removing duplicates, correcting errors, and filling missing values
- **Data transformation:** Converting data into a standard format (e.g., date formats, currency normalization)
- **Data enrichment:** Enhancing data with additional attributes from internal or external sources
- **Standardization:** Aligning naming conventions, schemas, and taxonomies This layer ensures that all data is reliable, consistent, and ready for accurate analysis.

D. Identity Resolution Layer

This layer focuses on linking and unifying customer data across different systems to create a single, accurate customer identity.

Key functions include:

- **Deterministic matching:** Using unique identifiers such as email ID, phone number, or customer ID
- **Probabilistic matching:** Using algorithms to match records based on patterns and likelihood (e.g., name + address + behavior)
- **Deduplication:** Eliminating redundant records

- **Golden record creation:** Building a single, authoritative version of each customer. This step is crucial for avoiding fragmented customer views and ensuring consistent personalization.

E. Unified Customer Profile Layer

This layer consolidates all resolved and harmonized data into a comprehensive customer profile, often referred to as a **360-degree customer view**.

Features include:

- Centralized storage of customer data
- Integration of demographic, behavioral, transactional, and engagement data
- Real-time updates to reflect the latest customer interactions
- Accessibility for various business applications and tools

These unified profiles enable organizations to deeply understand customer behavior, preferences, and lifecycle stages.

F. Activation Layer

The activation layer turns insights into action by enabling data-driven decision-making and personalized customer engagement across all channels.

Key functions include:

- Delivering insights to business systems and tools
- Enabling **personalized marketing campaigns** (email, ads, push notifications)
- Supporting **sales teams** with customer intelligence and lead scoring
- Enhancing **customer service** through contextual support and faster resolution
- Powering **analytics and reporting** for strategic decision-making

V. Customer 360 Framework

Customer 360 is a strategic approach that provides a unified and comprehensive view of customer data across all touchpoints and systems within an organization. It integrates data from multiple sources to create a single, consistent, and accurate customer profile.

This approach allows businesses to understand customers holistically—covering who they are, how they interact, what they purchase, and how they feel about the brand. By breaking down data silos, Customer 360 enables organizations to deliver seamless and personalized experiences across all channels.

A. Components of Customer 360

1. Personal Information

This includes basic customer details used to identify and contact individuals:

- Name, age, gender
- Phone number, email address
- Location and demographic details

This data forms the foundation for customer identification and segmentation.

2. Behavioral Data

Behavioral data captures how customers interact with digital platforms and services:

- Website activity (pages visited, time spent, clicks)

- Mobile app usage patterns
- Search queries and browsing history
- Interaction with advertisements or campaigns

This helps organizations understand customer intent, preferences, and engagement levels.

3. Transaction History

This component records all financial interactions between the customer and the business:

- Purchases and order history
- Payment methods and billing details
- Returns, refunds, and cancellations
- Subscription and renewal information

Analyzing transaction data helps identify buying patterns, customer lifetime value, and revenue trends.

4. Communication History

This includes all interactions between the customer and the organization:

- Emails, SMS, and push notifications
- Customer support chats and call center records
- Feedback, complaints, and service requests

Maintaining communication history ensures consistent and context-aware interactions across channels.

5. Preferences and Interests

This component captures customer choices and inclinations:

- Product preferences and favorite categories
- Communication channel preferences (email, SMS, app notifications)
- Language and content preferences
- Interests based on past behavior

Understanding preferences allows businesses to tailor experiences and recommendations.

6. Additional Components (Extended View)

To further enrich Customer 360, organizations often include:

- **Social media data:** Engagement, sentiment, and brand perception
- **Loyalty and rewards data:** Points, memberships, and tier status
- **Device and location data:** Device type, geolocation insights
- **Predictive insights:** Churn risk, next best action, and recommendations

B. Importance of Customer 360

1. Enables Personalized Customer Experiences

Customer 360 allows organizations to deliver highly relevant and tailored experiences by leveraging unified data.

- Personalized product recommendations
- Targeted marketing campaigns
- Customized communication based on behavior and preferences This leads to stronger customer engagement and brand loyalty.

2. Improves Decision-Making

With access to a complete and accurate customer view, businesses can make informed, data-driven decisions.

- Better segmentation and targeting
- Improved forecasting and planning
- Identification of trends and opportunities

This reduces uncertainty and enhances strategic planning.

3. Enhances Customer Satisfaction

By understanding customer needs and history, organizations can provide faster and more effective service.

- Reduced response time in customer support
- Context-aware interactions
- Consistent experience across channels

Satisfied customers are more likely to remain loyal and recommend the brand.

4. Increases Operational Efficiency

Customer 360 eliminates data silos and reduces redundancy across systems.

- Streamlined workflows and processes
- Improved collaboration between departments
- Reduced manual effort and errors

This results in cost savings and better resource utilization.

5. Drives Revenue Growth

A unified customer view enables businesses to identify cross-selling and up-selling opportunities.

- Increased conversion rates
- Higher customer lifetime value
- Improved retention strategies

6. Strengthens Customer Retention

By identifying at-risk customers and addressing their concerns proactively, organizations can reduce churn.

- Predictive analytics for churn detection
- Proactive engagement strategies
- Loyalty program optimization

VI. Role of Salesforce Data Cloud in Customer 360

Salesforce Data Cloud plays a central role in enabling a robust Customer 360 strategy by unifying, analyzing, and activating customer data across the enterprise. It serves as the backbone that connects disparate systems and transforms raw data into actionable insights.

A. Data Integration

Salesforce Data Cloud integrates data from multiple internal and external sources, eliminating data silos and ensuring seamless data flow across systems.

Key capabilities include:

- Integration with CRM platforms, marketing tools, e-commerce systems, and third-party applications
- Support for structured and unstructured data
- Use of APIs, connectors, and data pipelines for continuous data ingestion
- Scalability to handle large volumes of data

This integration ensures that all customer data is brought together into a single unified platform, forming the foundation of Customer 360.

B. Identity Resolution

A critical function of Salesforce Data Cloud is creating accurate and unified customer identities. It resolves duplicate and fragmented records to establish a single source of truth.

Key features include:

- Deterministic matching using unique identifiers (email, phone number, customer ID)
- Probabilistic matching using advanced algorithms and behavioral patterns
- Deduplication and record consolidation
- Creation of a “golden customer profile”

This ensures that organizations have a consistent and reliable view of each customer across all touchpoints.

C. Real-Time Analytics

Salesforce Data Cloud enables organizations to process and analyze data in real time, allowing immediate insights and faster decision-making.

Key benefits include:

- Real-time data processing and updates
 - Dynamic dashboards and reporting
 - Instant identification of customer behavior and trends
 - Ability to respond quickly to customer actions (e.g., abandoned cart, service requests)
- Real-time analytics empower businesses to act proactively rather than reactively.

D. Personalization

With unified and up-to-date customer data, Salesforce Data Cloud enables highly personalized experiences across channels.

Examples include:

- Personalized email campaigns and recommendations
- Dynamic website content based on user behavior
- Customized offers and promotions
- Omnichannel engagement (email, mobile, social, web)

This level of personalization improves customer engagement, satisfaction, and loyalty.

E. AI-Driven Insights

Salesforce Data Cloud leverages artificial intelligence and machine learning to generate predictive and prescriptive insights.

Key capabilities include:

- Customer segmentation based on behavior and preferences
- Predictive analytics for churn, conversion, and lifetime value
- Next-best-action recommendations
- Trend analysis and forecasting

These AI-driven insights help organizations anticipate customer needs and optimize business strategies.

F. Data Activation and Orchestration

Beyond analysis, Salesforce Data Cloud enables activation of insights across business systems.

Key functions include:

- Seamless integration with marketing automation, sales, and service platforms
- Triggering automated workflows based on customer behavior
- Real-time campaign orchestration
- Cross-channel engagement management

This ensures that insights are not just generated but effectively utilized.

G. Data Governance and Security

Salesforce Data Cloud ensures that customer data is managed securely and in compliance with regulations.

Key aspects include:

- Role-based access control
- Data encryption and protection
- Compliance with data privacy regulations (e.g., GDPR)
- Data quality monitoring and governance policies

Strong governance builds trust and ensures responsible data usage.

VII. Use Case: Sales Optimization**A. Scenario**

A retail organization aims to improve its overall sales performance and revenue growth by leveraging customer data more effectively. The company faces challenges such as fragmented customer information, inconsistent targeting, low conversion rates, and limited visibility into customer behavior.

To address these issues, the organization adopts a Customer 360 approach powered by Salesforce Data Cloud to unify and analyze customer data across all touchpoints.

Implementation**1. Data Collection and Integration**

Data is gathered from multiple sources to build a comprehensive dataset, including:

- Website visits (browsing behavior, product views, abandoned carts)
- Purchase history (transactions, frequency, order value)
- Customer service interactions (complaints, queries, feedback)
- Marketing engagement (email opens, clicks, campaign responses)

This data is ingested into Salesforce Data Cloud using APIs, connectors, and real-time streaming pipelines.

2. Data Unification and Customer Profile Creation

The platform performs identity resolution to merge duplicate records and create a unified customer profile.

- A single “golden record” is created for each customer
- Data from multiple channels is consolidated into a 360-degree view
- Profiles are continuously updated with real-time interactions

This unified view enables the sales team to understand each customer’s journey, preferences, and behavior.

3. AI-Driven Analysis and Predictive Modeling

Advanced analytics and AI models are applied to extract insights and predict future outcomes.

Key analytical capabilities include:

- Identifying high-value customers and purchase patterns
- Predicting customer lifetime value (CLV)
- Forecasting future purchases and demand trends
- Detecting churn risk and disengagement signals

AI also recommends the **next best action**, such as offering discounts, suggesting complementary products, or initiating follow-ups.

4. Sales Enablement and Personalization

The insights generated are activated across sales and marketing channels to drive targeted actions.

- Sales teams receive prioritized lead lists based on scoring models
- Personalized product recommendations are delivered to customers
- Dynamic pricing and promotional strategies are applied
- Automated follow-ups are triggered based on customer behavior This ensures that every customer interaction is relevant and timely.

5. Continuous Monitoring and Optimization

Performance is continuously tracked using dashboards and analytics tools.

- Conversion rates, sales performance, and campaign effectiveness are monitored
- A/B testing is used to refine strategies
- Feedback loops help improve AI models over time

This iterative approach ensures ongoing improvement in sales outcomes.

Outcomes**1. Improved Lead Scoring**

- More accurate identification of high-potential leads
- Better prioritization for sales teams
- Increased efficiency in lead conversion efforts

2. Enhanced Customer Segmentation

- Customers are grouped based on behavior, preferences, and value
- Enables targeted marketing and sales strategies
- Supports personalized engagement at scale

3. Increased Conversion Rates

- Relevant offers and timely interactions improve purchase likelihood
- Reduction in abandoned carts and missed opportunities
- Higher effectiveness of marketing campaigns

4. Higher Customer Satisfaction

- Personalized experiences improve customer engagement
- Faster and more relevant responses to customer needs
- Consistent experience across all channels

5. Revenue Growth and Business Impact

- Increase in average order value (AOV)
- Higher customer lifetime value (CLV)

- Improved retention and reduced churn

VIII. Benefits of Salesforce Data Cloud

1. Improved Customer Experience

Organizations can deliver highly personalized and seamless experiences by leveraging unified customer data. With a complete 360-degree view, businesses can understand customer preferences, behaviors, and history across all touchpoints.

Key advantages include:

- Personalized product recommendations and content
- Consistent interactions across channels (web, mobile, email, support)
- Faster response times due to access to complete customer context
- Proactive engagement based on real-time behavior

This results in stronger customer relationships, increased loyalty, and improved brand perception.

2. Enhanced Decision-Making

Salesforce Data Cloud enables organizations to make informed, data-driven decisions by providing real-time insights and analytics.

Key benefits include:

- Access to accurate and up-to-date data
- Real-time dashboards and reporting
- Identification of trends, patterns, and anomalies
- Better forecasting and strategic planning

Decision-makers can rely on data rather than assumptions, reducing risks and improving outcomes.

3. Increased Revenue

By leveraging unified data and AI-driven insights, organizations can optimize their sales and marketing strategies to drive revenue growth.

How it contributes to revenue:

- Targeted marketing campaigns with higher conversion rates
- Identification of cross-selling and upselling opportunities
- Improved lead scoring and prioritization
- Reduction in customer churn through proactive engagement

These capabilities lead to increased customer lifetime value and overall profitability.

4. Scalability

As a cloud-based platform, Salesforce Data Cloud is designed to handle growing volumes of data and users without compromising performance.

Key features include:

- Elastic infrastructure that scales with business needs
- Ability to process large volumes of structured and unstructured data
- Support for real-time and batch processing at scale
- Seamless integration with expanding data sources

This ensures that organizations can grow without worrying about system limitations.

5. Real-Time Data Activation

One of the major advantages is the ability to act on data instantly.

Key capabilities include:

- Triggering real-time actions based on customer behavior
- Immediate personalization of offers and content
- Faster response to market changes and customer needs

This helps businesses stay agile and competitive in dynamic environments.

6. Improved Data Quality and Governance

The platform ensures that data is accurate, consistent, and secure.

Key aspects include:

- Data cleansing and standardization
- Deduplication and identity resolution
- Role-based access control and data security
- Compliance with data privacy regulations

High-quality data leads to more reliable insights and better decision-making.

7. Operational Efficiency

By centralizing customer data and automating processes, organizations can significantly improve efficiency.

Benefits include:

- Reduction in manual data handling and duplication
- Streamlined workflows across departments
- Better collaboration between sales, marketing, and service teams
- Faster execution of campaigns and business processes This results in cost savings and improved productivity.

8. AI-Driven Innovation

Salesforce Data Cloud leverages artificial intelligence to unlock advanced capabilities.

Examples include:

- Predictive analytics for customer behavior
- Next-best-action recommendations
- Intelligent segmentation and targeting
- Automation of repetitive tasks

AI-driven innovation helps organizations stay ahead in a competitive market.

IX. Challenges and Limitations

1. Data Privacy and Security

Handling large volumes of sensitive customer data introduces significant privacy and security concerns. Organizations must ensure that personal and behavioral data is protected from unauthorized access, breaches, and misuse.

Key challenges include:

- Compliance with global and regional regulations such as GDPR and other data protection laws
- Managing customer consent and data usage permissions
- Ensuring data encryption both at rest and in transit
- Preventing data breaches, cyberattacks, and insider threats

Failure to address these concerns can lead to legal penalties, reputational damage, and loss of customer trust.

2. Integration Complexity

Integrating data from multiple systems—especially legacy platforms—can be technically complex and time-consuming. Many organizations operate with outdated infrastructure that may not easily connect with modern platforms like Salesforce Data Cloud.

Key challenges include:

- Lack of standardization across systems and data formats
- Difficulty in connecting legacy systems with modern APIs
- Managing real-time and batch data integration simultaneously
- Dependency on multiple vendors and tools

This complexity can slow down implementation and increase project risks.

3. Data Quality Issues

The effectiveness of a Customer 360 solution heavily depends on the quality of the underlying data. Poor data quality can lead to inaccurate insights and ineffective decision-making.

Common issues include:

- Duplicate records and inconsistent data entries
- Missing or incomplete customer information
- Outdated or irrelevant data
- Errors during data entry or migration

Organizations must invest in data cleansing, validation, and governance processes to maintain high-quality datasets.

4. Cost and Implementation Effort

Implementing and maintaining a comprehensive data platform requires significant financial and operational investment.

Cost factors include:

- Licensing and subscription costs for platforms like Salesforce Data Cloud
- Infrastructure and storage expenses
- Skilled personnel for development, integration, and maintenance
- Training and change management for employees

Additionally, the implementation process can be time-intensive, requiring careful planning and execution.

5. Change Management and Adoption

Introducing a new data platform often requires organizational changes in processes, workflows, and culture. Employees may resist adopting new systems or lack the necessary skills.

Challenges include:

- Training teams to effectively use new tools
- Aligning different departments (sales, marketing, IT)
- Overcoming resistance to change
- Ensuring consistent usage across the organization

Without proper adoption, the full value of the platform may not be realized.

6. Data Governance and Ownership

Managing who owns, accesses, and controls data across the organization can be difficult.

Key concerns include:

- Defining clear data ownership and accountability
- Establishing governance policies and standards
- Ensuring consistent data usage across departments
- Avoiding data silos even within centralized systems

Strong governance frameworks are essential for maintaining data integrity and compliance.

7. Real-Time Processing Challenges

While real-time data processing provides significant advantages, it also introduces technical challenges.

Examples include:

- Handling high-velocity data streams
- Ensuring low latency and system performance
- Managing infrastructure scalability
- Avoiding data synchronization issues

These challenges require robust architecture and advanced processing capabilities.

8. Dependency on Technology and Vendors

Organizations may become highly dependent on specific platforms or vendors, such as Salesforce Data Cloud.

Risks include:

- Vendor lock-in
- Limited flexibility in switching platforms
- Dependence on vendor updates and support
- Potential cost increases over time

Careful vendor selection and long-term planning are necessary to mitigate these risks.

X. Future Scope

The future of Salesforce Data Cloud and Customer 360 includes:

- Advanced AI and machine learning capabilities
- Real-time personalization at scale
- Improved data governance frameworks
- Integration with emerging technologies such as IoT and blockchain Organizations that adopt these advancements will gain a competitive advantage.

XI. Conclusion

Salesforce Data Cloud is a powerful platform that enables organizations to build a comprehensive Customer 360 view. By integrating and analyzing data in real time, it helps businesses overcome data silos and deliver personalized customer experiences.

The implementation of Customer 360 enhances customer satisfaction, improves decision-making, and drives business growth. Despite challenges, the benefits of Salesforce Data Cloud make it an essential component of modern CRM strategies.

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