RealCDP

CERTIFICATION PREPARED FOR

Salesforce, Inc.

2024 UPDATE March 31, 2024
AUDIT COMPLETION August 15, 2023

CDP

CUSTOMER DATA PLATFORM

INSTITUTE

HEREBY GRANTS THIS

RealCDP CERTIFICATE 2024

PRESENTED TO

SALESFORCE DATA CLOUD

Entitled to be known as a RealCDP™ and authorized to display the RealCDP™ badge
for successfully completing a comprehensive evaluation and providing satisfactory
proof that meets all qualifications set forth by the Customer Data Platform Institute.

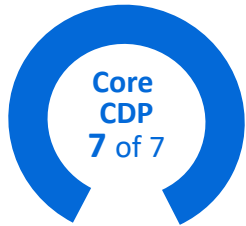In Witness Thereof, this Thirty-First day of March 2024.

DAVID RAAB
President, CDP Institute

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VERNON TIREY
RealCDP Auditor

RealCDP Audit Report

Confidential Report For: Salesforce, Inc.   Audit Complete Date: 8/15/2023

Core CDP 7 of 7

✔ **Ingest Data**
✔ **Maintain Data**
✔ **Store Historical Data**
✔ **Unified Customer Profile**
✔ **Privacy**
✔ **Share Customer Data**
✔ **Real Time Data Updates**

Salesforce Data Cloud meets all core RealCDP certification requirements. Data Cloud is a SaaS CDP platform hosted in AWS supporting both B2C and B2B companies. Data ingestion via the Data Streams module is seamless with other Salesforce platforms but also fast and flexible with non-Salesforce sources. Data can be ingested in any format and be received from any source in either batch or real time and users can set up new feeds in the easy-to-use drag-and-drop interface. Full historical detail data is stored to enable profile rebuilds and dynamic scaling is used, making the platform highly performant at large volumes (2.7 trillion records processed monthly). Data is typically stored in S3 but "bring your own data lake" (Snowflake, Google Cloud, e.g.) is also possible. Unified customer profiles are created using a combination of deterministic and probabilistic matching and are enhanced with data from a deep list of 3rd party data partners and user-created derived variables. Identity Insights are provided to give users information on the ID resolution process. Privacy and system security is strong; the platform is fully compliant with all North American and European privacy regulations. Data can be shared to any platform in both automated and ad hoc modes. Real time updates are enabled via the Salesforce Interactions SDK.

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✔ **Channels Supported**
✔ **Data Sources Supported**
✔ **3rd Party Applications**
✔ **Real Time Processing**
✔ **Data Hygiene**
✔ **End User Training**

Salesforce Data Cloud fully meets all enhanced RealCDP requirements. All channels are supported for data ingestion and sharing, with over 150 pre-built two-way connectors to leading martech and data management platforms. Data Cloud connects to any 3rd party application and has seamless integration with other Salesforce platforms such as Marketing Cloud, CRM, etc. Real time processing and Data Actions enable users to send real time messages to customers in Salesforce Marketing Cloud, Salesforce CRM, or via a webhook. Data hygiene functionality is included, with rules-based and reference table processes in place to improve data quality and standardization. Sophisticated, user-directed matching rules give direct control over ID resolution processing. Data can be enhanced to further improve matching by engaging with a number of 3rd party data and ID graph partners. Full user training is provided post-implementation and weekly support calls and a robust set of online videos, manuals, and documentation is available.

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✔ **Analytics & Reporting**
✔ **Model Building & Scoring**
✔ **Personalization**
✔ **Journey Orchestration**

Salesforce Data Cloud together with Marketing Cloud Engagement, Personalization, and Intelligence meets all CDP Stack requirements. Pre-built interactive dashboards are included OOTB; examples are the overview of customer engagement, customer counts by segment, and segment performance. These are built in Tableau, which is integrated for every client (possible to integrate with other 3rd party BI tools) and provides best-in-class reporting, visualization, and report-sharing capabilities. Further insights can be generated using the Calculated Insights functionality. Model building and scoring is delivered via Einstein, a set of AI technologies built into the Salesforce platform to transform real-time data signals into actionable insights. Data Cloud comes with a strong drag-and-drop, Boolean segmentation tool to explore all data housed in the data model and to fuel personalization efforts. Personalization and decisioning combine in-depth behavioral analytics, first-party data, and machine learning. Journey orchestration in Marketing Cloud comes with good functionality. (A separate license is required for Marketing Cloud components).

OTHER

Salesforce employs a "bring your own model" approach to predictive sciences. Clients can easily import models constructed externally in tools like AWS Sagemaker and Google Vertex, bringing additional flexibility to the platform.

SUMMARY

Salesforce Data Cloud is a RealCDP and a strong addition to the Salesforce suite of products, improving performance via richer, more insightful customer profiles. Though integration with non-Salesforce marketing and sales platforms is good, clients with existing Salesforce products in place will see the most benefit. Clients who desire CDP integration with non-marketing systems (call center, sales, etc.) will find a good fit here. Current geographic coverage for Data Cloud is North America, Europe and India; top industries served are retail, financial services, telecom/utilities, manufacturing, health and life sciences, media, consumer goods, and technology.

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Salesforce, Inc. Findings

The CDP Institute audits 17 CDP related capabilities. Below are the high-level findings for Salesforce, Inc.

Requirements fall into three categories:

✔ **Meets All Requirements**
✔ **Meets Some Requirements**
✘ **Meets No Requirements**

CAPABILITY	TYPE	Findings
✔ Ingest Data	Core CDP	Meets all requirements
✔ Maintain Data	Core CDP	Meets all requirements
✔ Store Historical Data	Core CDP	Meets all requirements
✔ Unified Customer Profile	Core CDP	Meets all requirements
✔ Privacy	Core CDP	Meets all requirements
✔ Share Customer Data	Core CDP	Meets all requirements
✔ Real Time Updates	Core CDP	Meets all requirements
✔ Channels	CDP Enhancement	Meets all requirements
✔ Data Sources Supported	CDP Enhancement	Meets all requirements
✔ 3rd Party Applications	CDP Enhancement	Meets all requirements
✔ Real Time Processing	CDP Enhancement	Meets all requirements
✔ Data Hygiene	CDP Enhancement	Meets all requirements
✔ End User Training	CDP Enhancement	Meets all requirements
✔ Analytics & Reporting	CDP Stack	Meets all requirements
✔ Model Building & Scoring	CDP Stack	Meets all requirements
✔ Personalization	CDP Stack	Meets all requirements
✔ Journey Orchestration	CDP Stack	Meets all requirements

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Directory of Audited CDP Capabilities

For a full description of CDP capabilities please see the RealCDP Audit Guide. Below is a brief description of each CDP capability reviewed in the RealCDP Certification Audit. To qualify as a RealCDP a vendor must fully support all Core CDP capabilities.

CAPABILITY	TYPE	DESCRIPTION
Ingest Data	Core CDP	Data ingestion and data capture capabilities for all data types
Maintain Data	Core CDP	Maintain and manage all required customer and demand-side data
Store Historical Data	Core CDP	Store all detailed historical and longitudinal data required by Users
Unified Customer Profile	Core CDP	Create and manage unified customer profiles
Privacy	Core CDP	Manage personal identifiers, consent & privacy management, privacy enforcement
Share Customer Data	Core CDP	Distribute and/or syndicate data wherever (and ideally whenever) needed
Real Time Updates	Core CDP	Capture, update, share, and decision data in real time
Channels	CDP Enhancement	CDP supported Channels and available Connectors to capture and distribute data
Data Sources Supported	CDP Enhancement	Third Party Applications that provide, pre-integrate, and or support the CDP system
3rd Party Applications	CDP Enhancement	Third Party Applications that provide, pre-integrate, and or support the CDP system
Real Time Processing	CDP Enhancement	Enhanced Real-time processing update capabilities (ideally in sub-second speed)
Data Hygiene	CDP Enhancement	Data scrubbing, filtering, standardizing, formatting, and matching capabilities
End User Training	CDP Enhancement	End User training, workshops, documentation, and educational materials
Analytics & Reporting	CDP Stack	Report building and sharing for data, program performance and customer analytics
Model Building & Scoring	CDP Stack	Model development and data scoring in support of targeting and decisioning
Personalization	CDP Stack	Customer Personalization solutions including tools, technologies, and techniques
Journey Orchestration	CDP Stack	Customer Journey Orchestration solutions for multi-touch, multi-channel marketing

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