

nextview...

The design and tech firm.

Release Paper

SALESFORCE WINTER '20 RELEASE



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INTRO

Huub Waterval
CEO Nextview



Dear Trailblazer,

Autumn has started and Winter '20 is coming! Every season has its charm and personally I really like Autumn. Why? It is always the busiest time of the year! We can look back on the things that we have already achieved this year and can already see the completion of our backlog on the horizon. Besides that, it is also the period where we start looking ahead for the next year, continuing on our strategic plans and formulating our ambitions for execution in 2020! Autumn gives energy and makes us proud at the same time!

Things are looking bright for Nextview! Last year we created a new strategic plan and decided to fully focus on Design Thinking and Salesforce Consulting and invest in four key competence areas being Field Service Lightning, Einstein Analytics, Mulesoft and B2B Commerce. Also, we built a brand new Industry Consulting Team around our three focus industry clusters: Financial Services, Professional Services & Utilities and Manufacturing, CPG & High Tech.

Naturally, we do this to align our strategy with the Salesforce strategy and so we can keep on making a difference for our customers. We are very proud that this year we not only continued working for our existing clients, but also welcomed a pretty amazing group of new clients! The reasons for choosing us, make us proud! Most of the time, it is the combination of our integrated approach of Design Thinking and Agile Delivery that enables us to have a look at the big picture but most of all to unlock the hidden potential of underutilized touchpoints in the customer journey of the customers from our clients.

As a result we expect our Salesforce business to grow with 40% this year, which is phenomenal. This is a result of the increased quality that we deliver for our customers. Our core value "We simply deliver Excellence" is at the heart of all of our business! It is also reflected in our recruiting process, believe it or not, we have had 289 job applications this year to date, of which we hired only 11 new colleagues. "Work as Friends", one of our other core values, therefore now also implies "work with the best". But foremost "We do business with our hearts", every day. And it is great to see that this is now not only reflected in the Social & Positive Impact that we create, but also in our performance.

So what's new in this release paper? Well, a lot of great things that can make your business run better! Our colleagues have selected the best features of the Winter '20 release in a couple of areas. For every area we have taken the top 3 things we believe you should know about.

Starting with Analytics, Tatiana explains everything about faceting and how this makes interactive dashboards so easy that even business users can create them. Jip has provided a great overview of all the Analytics Dashboards for Industries in Manufacturing, Financial Services and Healthcare. Last but not least, Rogier has listed important improvements when it comes to Data Management.

Our new colleague Nikolaj is very excited about the Financial Services Cloud with the new addition of Insurance for Financial Services Cloud, the new Seamless Mortgage Application Process and the Expanded Account Relationship Structures, completed with, what else, Einstein Analytics!

Our Sales Cloud team has also listed the top three improvements, being How to manage your team in a more customised way and how to sell your products more effectively with CPQ. Have a look what Niek has to say about it!

With Service Cloud being one of the other core clouds that runs at most of our customers, we are very happy with some great new features. For example, it has now become very easy to use Einstein for Case Classification, making it easier for customers with 100.000 to over 1.000.000 cases to automatically route them to the right service agents! We were also impressed with the ongoing investments in Field Service Lightning, Jeffrey explains the most important ones for you. And with Lightning Knowledge deeper embedded in the core of the Service Cloud it has now become much easier to share knowledge with your customers across all channels!

No Nexview team was more excited than the Platform team. Sometimes the small things mean the most. Most likely, you have already noticed the New Salesforce Mobile App, but are you aware of the new possibilities? Furthermore, we have Michael explain how the enhanced Flows now make it easier to solve complex business problems. And yes! There is a Recycle Bin now in Lightning Experience ;-) and Whatsapp can now be used for Service Agents (although still in pilot).

I hope you enjoy reading this release paper and naturally we are more than happy to help you improve your business and to unlock new touchpoints for your customers!

Happy Trailblazing & hope to see you at Dreamforce!

Huub

SALES CLOUD

Our Top 3 new features in Sales Cloud Winter '20

1. Manage your teams in a more customized way!

One of the more underestimated functionalities is working in teams in Salesforce. Where previously you only had the possibility to set access levels and roles, you'll now be able to treat your team as an actual team with its own specific characteristics. This actually means that the Account & Opportunity Teams are now acting as normal Salesforce objects, which you can run automation on for example!

This will greatly help in identifying the internal team on deals & accounts, but also make sure they keep being involved at the right time. For example we'll be able to help you setup your automation to make sure that if a new rep gets involved at a client (or opportunity), they will automatically receive an update with all the relevant information and make sure everyone is highly involved at a client.

Adoption, 360 degree view and customer journeys will be on a whole new level from now on!

As if CPQ solutions in its current state weren't efficient enough, this will lead to having an even more productive and efficient sales machine!

Extended customizations for working with teams

*CASE ACCESS	*OPPORTUNITY ACCESS	START DATE	END DATE
Read Only	Private		
Read Only	Private		
Read Only	Private		

Buttons: Add Row, Cancel, Save



"Making sure your sales teams sell the right products with the right pricing, will help our customer make sure they get the most output of their product/market combinations and highly improve the customer experience at the same time.."

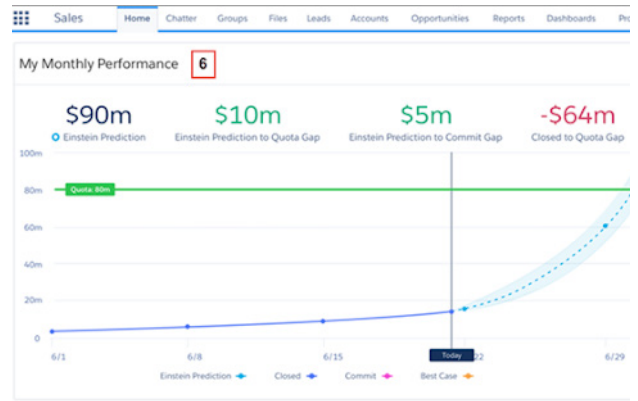
Niek Bachman, Practice Manager Sales Cloud

2. Einstein will now predict how much you will sell!

With predictive forecasting Einstein will make an assessment by it's AI magic on the deals you're going to make! How much will your total sales be? But also; where do these sales come from? Existing business? New business? Einstein will tell you just that and is making this interactive as well, where you can click through to all the details! This will be a huge help in how you can actually steer on your sales and where your (teams) focus should be.

With this we're able to go from doing reactive type of sales to a much more proactive approach! This will not only lead to "just" more revenue, but much more important: higher conversion rates of your opportunities, increased employee happiness with focus on the right things and a better fit with your end clients. If done right of course!

That's also why this requires involvement from all departments, from top management to the the sales reps, so you can decide



Guidance Used	Product Name	Additional Disc. (%)	Guidance	Viewed	Quote: Quote Number	Created By: Full Name	Last Modified By: Full Name
10	Laptop	20.00%	10.00%	0.00%	4		
	Laptop	20.00%	10.00%	0.00%	4		
Subtotal		Avg: 20.00%	Max: 0.00%	Min: 0.00%	0		
30	Tablet	15.00%	10.00%	0.00%	4		
	Smartphone	16.00%	10.00%	0.00%	4		
	Workstation	18.00%	10.00%	0.00%	4		
Subtotal		Avg: 16.33%	Max: 10.00%	Min: 10.00%	0		
30	Workstation	10.00%	10.00%	0.00%	4		
	Monitor	10.00%	10.00%	0.00%	4		
	Smartphone	10.00%	10.00%	0.00%	4		
	Monitor	10.00%	10.00%	0.00%	4		
	Tablet	10.00%	10.00%	0.00%	4		
Subtotal		Avg: 10.00%	Max: 10.00%	Min: 10.00%	4		
Total (10)		Avg: 13.90%	Max: 10.00%	Min: 0.00%	4		

3. Sell your products more effectively with Salesforce CPQ

Salesforce CPQ is one of the best enablers in selling in a more effective way in general. However, what are the best products & services to bring to the attention to your clients?

Salesforce CPQ now enables you to make the right choices based on the usage of the various product/market combinations which have been selected in the past. View the effectiveness of your pricing guidance with fields that show whether sales reps viewed the guidance and whether they accepted its target discount. When used in reports, the fields help you see where pricing guidance was used and evaluate whether it improved sales.

As if CPQ solutions in it's current state werent efficient enough, this will lead to having an even more productive and efficient sales machine!



"Using predictive forecasting greatly helps our own organisation in discovering (potential) gaps, but more importantly: at what time do we need to land our deals to make sure we have the most optimal utilization with all our consultant colleagues who can be at the right type of projects on the right moment!"

Lars Klumpes, Client Director

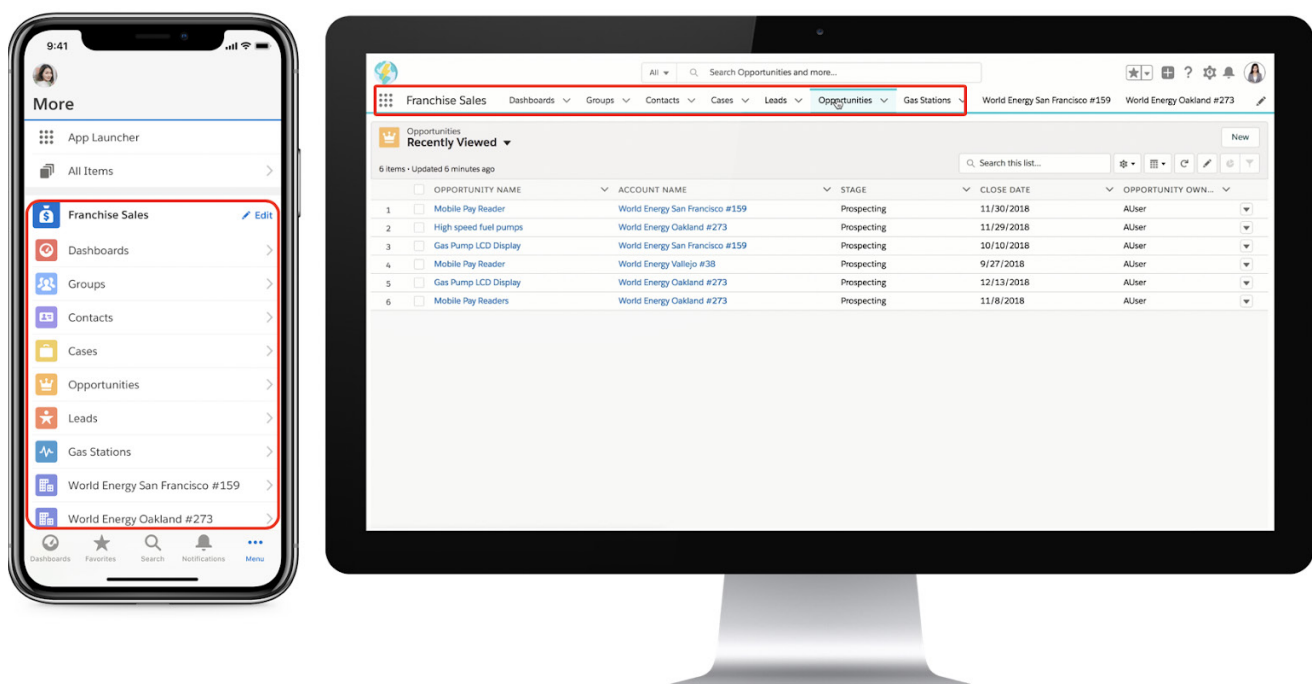
SALESFORCE PLATFORM

Top new Platform Features in Winter '20.

The New Salesforce Mobile App

With Winter '20 Salesforce delivers an entire new Mobile experience through the New Salesforce Mobile App which not only delivers a modern looking app with familiar navigation, but more importantly gives users a unified experience across desktop and mobile devices. Other features include among other the ability to tailor the experience to users dependent on their needs, the device they are using and what role they have within your organization. Let's explore some of the most important new features.

1. New mobile navigation bar: The new navigation bar added to the bottom of the Salesforce mobile app shows a familiar interface like other apps people use, making it more intuitive and easy to use. It gives users direct access their favorites, search, and notifications for each app.



The new Mobile app navigation

2. App launcher on mobile

The App Launcher has been added to Mobile allowing users to access their Salesforce app launcher and switch between Sales, Service, Marketing, or custom apps from their mobile device.

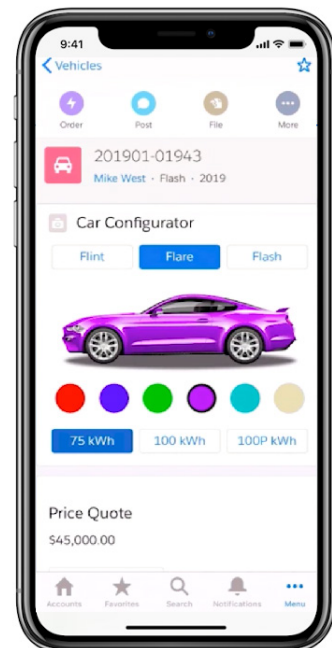
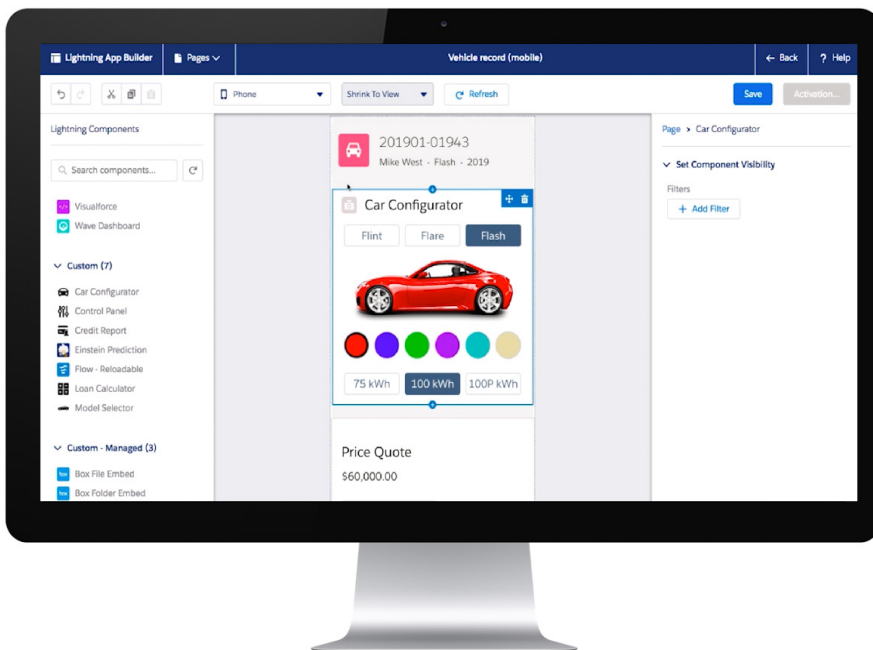
3. Personalization of navigation

Like on the desktop Lightning Experience on Mobile lets users customize their navigation bar so that every user can create a more relevant experience that applies to his or her role. For instance, an account executive might order their tabs as accounts, opportunities, and leads, while an inside sales representative want to have leads as their first tab. Changes to the desktop sync effortlessly to the Mobile app showing the users preferred ordering of navigation and making it easier to transition from using the desktop to mobile and vice versa

4. Easy customization using Lightning App Builder

Allows Salesforce admins to easily customize mobile pages, add (custom) components and specify if they are desktop or phone only or both and deploy with ease.

5. Enhanced Mobile Security: Adding Salesforce Enhanced Mobile Security, a paid mobile application management (MAM) add-on designed to meet high security and compliance needs for Salesforce for iOS and Salesforce for Android customers can add an additional layer of security through the Salesforce app



Similar experience on desktop and app



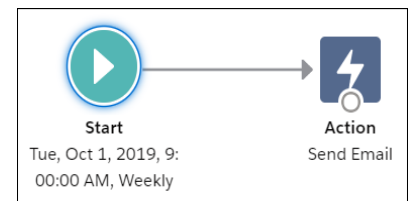
"The New Salesforce Mobile App is here! A modern mobile app we and our customers their users will really enjoy using. Delivering a familiar and unified experience between Salesforce on desktop and mobile will make it easier for users to learn, adopt while improving the ability to manage and support customized experiences. This will lower the total cost of ownership to bring Salesforce to mobile for our customers. In combination with Enhanced Mobile Security it can now also support a BYOD device strategy that is compliant and secure."

Nico Verhagen, Practice Manager Salesforce Platform

SALESFORCE PLATFORM

Start flows on a schedule

Salesforce Flow is a powerful tool for admins and the like to solve complex business issues and it will become more powerful with Winter '20 release which enables to start flows on a schedule.



Screens from the new flow scheduler

Recycle Bin now available in Lightning Experience

Sometimes it's the small things that matter most to users, like the recycle bin feature which up until now was only available in Classic. As of the Winter '20 release the Recycle Bin can be used directly from within Lightning.

The Recycle Bin in Salesforce Lightning

Connect to Your Customers With WhatsApp

This new and much awaited feature lets service agents directly communicate from within the Service Console through Whatsapp. The feature is still in pilot phase and salesforce is offering selected customers to take part in a pilot program. Contact your Success Manager to check if you are eligible for participation.



"Do note there is a per-org 24-hour limit for the number of scheduled flow executions at the scheduled start time. The org limit is whichever is greater: 250,000 records or the combined total of 200 records per user license. When a flow is scheduled to start, make sure that its schedule and conditions don't cause your org to go over the limit."

Michael Hardenbol, Senior Technical Architect

SALESFORCE EINSTEIN

Our 3 favorite Einstein Analytics trends in Winter '20!

With great enthusiasm we are welcoming the Winter '20 release for Einstein Analytics because besides supporting the analytics process further, it also shows a more strategic direction to grow more towards Industry Standards in the Data & Analytics, Data Engineering and Business Intelligence space. And all that while staying close to the unique Salesforce proposition of Embedded & Applied Intelligence.

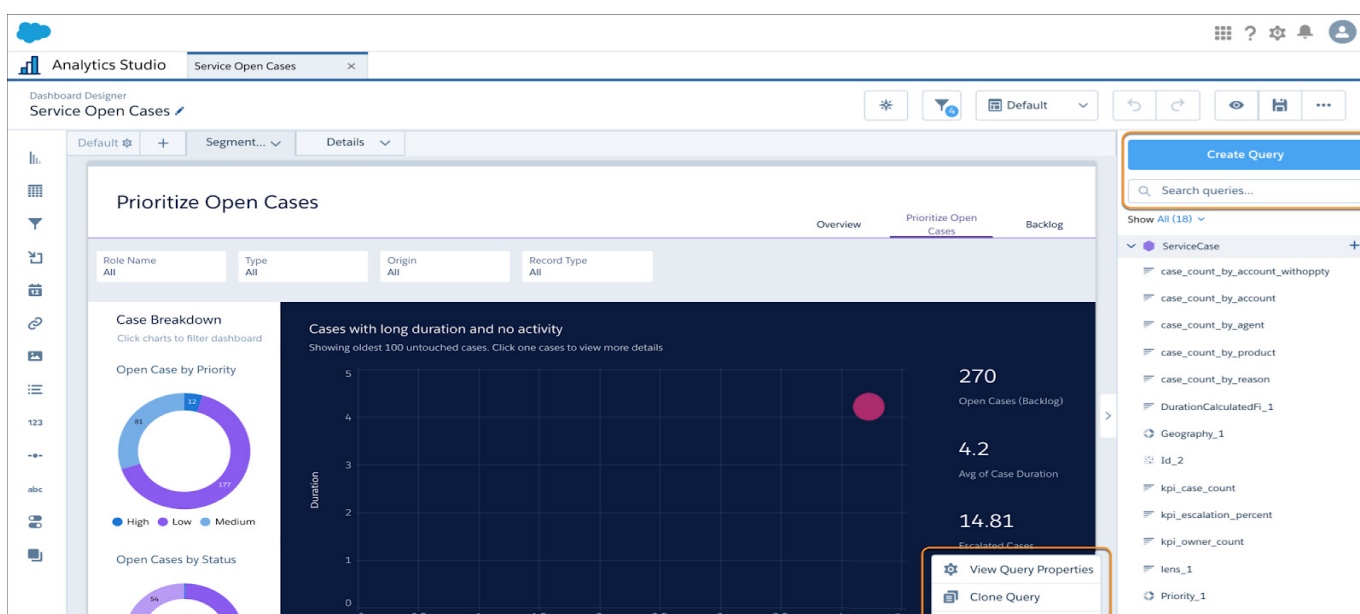
1. More Interactive Dashboards

To become data driven, we always strive for dashboards to be interactive. The (Business) user doesn't just read a number, it wants to analyse, slice, dice and interact with it. Making a dashboard interactive means to create a successful and user-friendly product. Perhaps the most effective key feature of Einstein Analytics in this is called "bindings". It allows graphs with different datasets to be linked to each other (Selecting a bar in Graph A will filter the numbers in Graph B).

The bindings feature is definitely considered an advanced functionality. Bindings need to be coded, and when you do setup a binding, it will limit the configuration settings of the Graphs involved. Luckily, in Winter 20' release, Salesforce is rolling out serious dashboard implementation updates that allow users to configure(!) bindings in the UI through faceting!

Bindings will remain a very powerful instrument but dashboard with coded bindings perform slower and are a step away from the light Analytics users. Salesforce is replacing the most used bindings with Facets, so that the process of creating a binding doesn't require JSON code anymore. It will not be there for all creative use of bindings, but we expect more and more binding-functionalities to move towards configurable facets.

That also means not only dashboards queries become faster even with bindings, but also interactive dashboards will be easier and faster to create (also by less advanced users) and of course easier to maintain.



New Einstein Analytics dashboards



"With this new Einstein Analytics feature, dashboard implementation becomes more accessible for everyone: the design process is not only about functionality and design itself but also about time-consuming and processes speed"

Tatiana Mashliak, Analytics Consultant

2. Industry focus

Worldwide, Salesforce is rolling out to so many different businesses, and everywhere Salesforce and their Platinum Partners like us are getting questions to finetune the Standard setup to better fit their way of working. Part of that is business specific, but mostly this is due to Industry Processes and Best Practices. Salesforce is letting you profit from all these requirements and is offering more specialised Industry Clouds and in Einstein Analytics this translates to new Analytical Dashboard App Templates!

With these (wizard driven) out of the box Dashboard sets, you could already quickly deliver a first version of a Dashboard set for specific areas like Sales and Service, but now also Manufacturing, Finance and soon CPG will have their Dashboard Templates.

We use these quick templates in our implementations to have a quick basis from which you can build further. This way you have the opportunity not to spend days (or even weeks) creating datasets and dashboard-elements that everyone in the Industry wants, but focus on the things that really are specific to your business. The Analytics Industry Templates for different industries in the upcoming Release:

Manufacturing

Analytics for Manufacturing helps visualize all sales and orders. You can find out which products perform better or worse and calculate sales impact on the revenue.

Financial Services

The Wealth Management App allows users to add fees, commissions and quotas to the dashboards, add trends to define account characteristics and even set up security settings.

The Insurance App allows agents to segment their customer-base and identify up/cross-sell opportunities. Managers will be able to track the team performance and get insight in what the top/bottom performers are doing differently to coach and share best practices.

The Retail Banking App allows users to calculate balance amounts for different types of accounts and include external charges and fees data. You can also spot trends by snapshotting datasets and see how accounts are changing.

Healthcare:

The Healthcare app allows users to quickly monitor patients/clients progress in care plans and identify those who are falling behind. Furthermore it contains dashboards for the Care Request process, Payment behavior and Referral sources.

"With the evolving of Wave, and more recently the acquisition of Tableau, Salesforce is more strongly securing their place in the top right Gartner Quadrant, It is great to see how Salesforce is delivering product value in line with their vision every single release.."

Luuk Martens, Practice Manager Analytics & AI



3. Improve Data Management

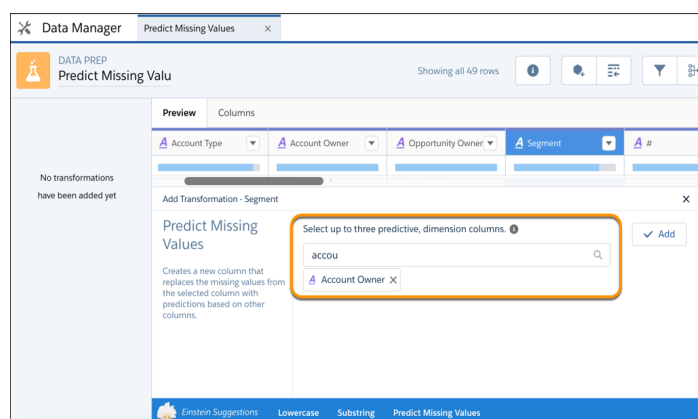
A frequently heard Data Quality quote: “Garbage in, Garbage out!” Your Dashboards can be pretty, but if the data under it is incorrect or of bad quality, your Dashboards are not as effective as they should be. Data preparation/engineering is one of the most important processes for a successful implementation of an Analytics App or Discovery Story. Salesforce has a lot of great data management layer updates that will certainly help to get closer to the right and clean data.

To list a few of our favorite highlights:

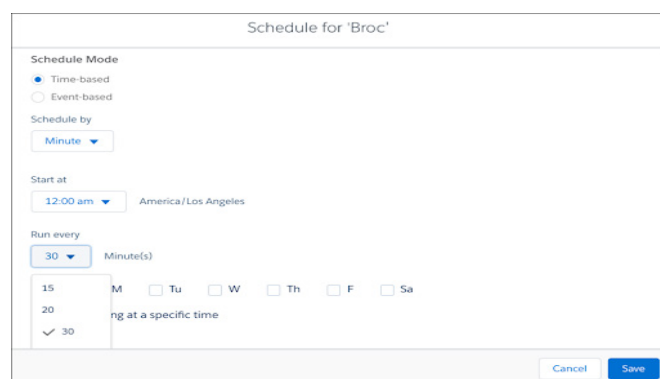
- Recipe is now called Data Prep and Steps are now called Queries, coming closer to the standard data terminology
- Dashboards can be refreshed multiple times per hour, every 15 minutes, keeping your Dashboards and Data even more up-to-date.
- Data Sync is enabled by default for all new orgs
- In Data Prep, Einstein can help you predict your missing values
- Support for Date format standardization

By improved connections and automated cleaning, we can rely and scale these created datasets, avoiding data drift and use the data that we/viewers/customers trust. All of this is connected to getting trusted insights as quick as possible to the Business and that is what really matters.

Predict missing values within Data Prep



Dashboard refresh settings



“Through sub-hour scheduling, we can establish fresh data in dashboards multiple times per hour and get one step closer to near-real-time data. It means the business can faster identify risks and opportunities to act on. Every customer has asked for this so far.”

Rogier Maaten, Einstein Analytics Champion at Nextview



The Insurance Cloud Dashboard



"This is a clear proof that Salesforce is adding Business Value! These new app templates definitely increase the speed of delivering dashboards, but they also are a great source of inspiration on what other businesses are analysing with their key metrics."

Jip Koning, Einstein Analytics Champion at Nextview

Financial Services Cloud

Add some confetti to your org to celebrate a status change!

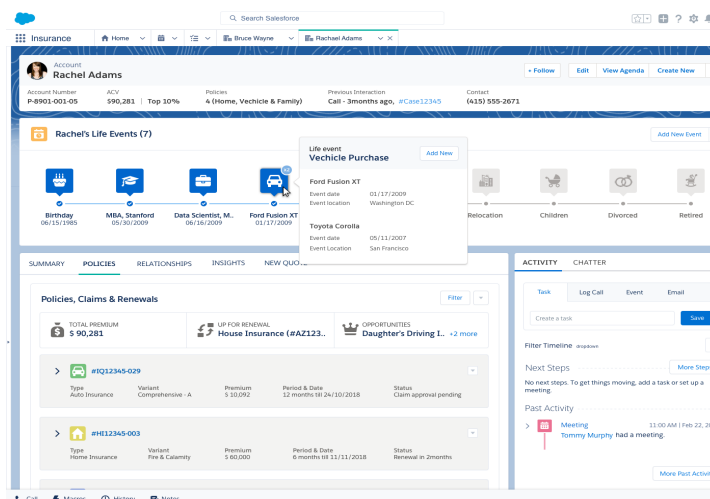
Financial Services Cloud winter '20 brings us exciting new features:

- Insurance for Financial Services Cloud (Yeah!)
- Seamless Mortgage application process (Good!)
- Expanded Account relationship structures (Finally!)
- Einstein Analytics

Financial Services Cloud Insurance

Yeah; after many years of working with Insurance companies Salesforce now has put all of their experience to create a Cloud specifically for Insurance companies. In it you can:

- Manage business and private insurance policies with an enhanced (standardized) data model that rolls-up relationships to households, companies, etc.
- Make life events, business milestones, private goals actionable by using standard components in Sales, Service and Marketing Cloud
- Collaborate with partners not using code but use the Insurance tailored community portal! This user friendly portal supports Insurance companies in their quest to join forces with their (independent) agents giving them access to data and capabilities. As a result actionable features will allow them to grow their business without using code!
- Improved specific Lightning components for Insurance are available
- Use Shield Platform Encryption!
- Insurance Agent console homepage making your data actionable to support your agents



Financial Services Cloud: Insurance



"With the new Winter '20 release Salesforce had made significant changes in the Financial Services Cloud. The renewed data model plus the release of the Insurance Cloud has a large impact on creating an integrated CRM platform that is based on user experience. This is a serious release!"

Nikolaj Kiepe, Industry Lead Financial Services at Nextview

Seamless Mortgage application process

Good! The Beta has become reality; now all can benefit capturing important process improvements:

Enhanced (standardized) data model allowing you to share data and processes across business lines in a seamless way

Guided specific mortgage flows for borrowers and loan officers using standard flow templates and screen components

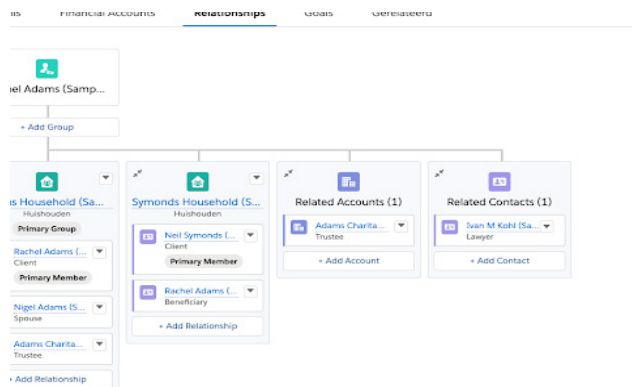
Document tracking & approvals for mortgage applications allowing your customers to directly upload files into FScloud

Tailored monitoring of document and process handling for mortgage process steps

Account-Account relationship entity making it possible to have households to include Mortgage (on customer view and in processes)

Expanded Account Relationships

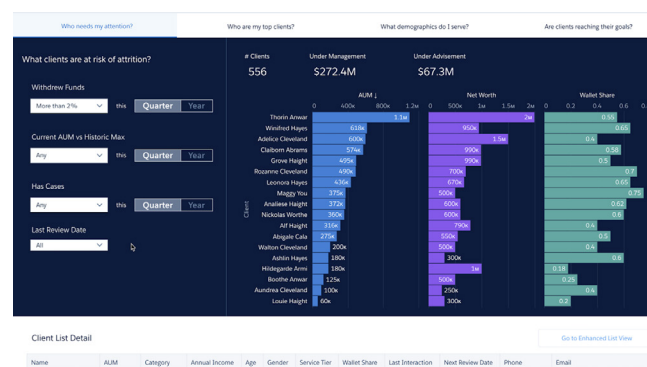
Finally! No more customizing your data model to include household or to connect bank accounts or policies into a household. No more customization to be able to set relationships between policy stakeholders and beneficiaries. This is the next step in getting a 360 customer view for all of those stakeholders that are involved in making the difference for your customers!



Expanded Account Relationships

Einstein Analytics

The Wealth Management, Retail Banking and Insurance Apps are a vital part of unlocking the power of the Financial Services cloud to its stakeholders. Using the new app templates Salesforce gets you up and running to turn data into actionable insights. Please read "Winter Einstein Analytics" to gain more insights on the possibilities.



Einstein Analytics within Financial Services Cloud

SERVICE CLOUD

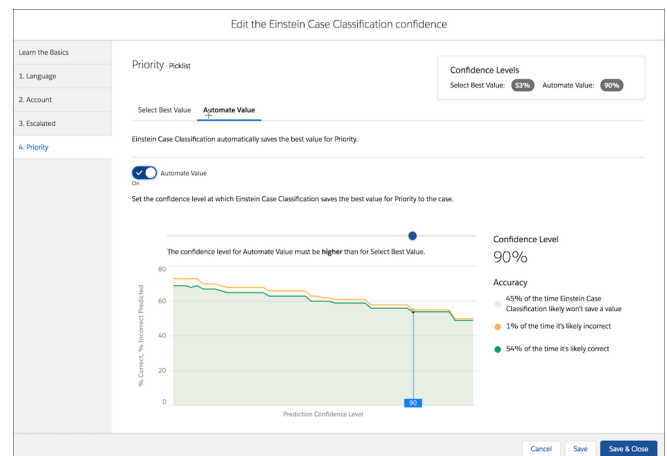
Add some confetti to your org to celebrate a status change!

1. Einstein takes work out of your service agents' hands, so that they can focus on making your customers happy

Having Einstein read through your cases and think along isn't anything new, but what is new is that you can configure Einstein Case Classification now to not just propose values for predicted fields but at a certain confidence level also automatically set the field value without any human intervention. Service Cloud offers some additional options on top of that in this release that will help making effective use of this new functionality, for example you can allow assignment rules to be re-run after Einstein sets predicted values. This way Service Cloud can intelligently route cases to the right agents.

Einstein Extended match rules

Einstein case classification



2. Field Service Lightning grows together with your ambitions in delivering great service in the field

The Winter '20 release also brings quite some additional features to our beloved Field Service Lightning product that will further increase productivity in both the scheduling department as well as on the road. After being piloted with several Salesforce customers Time Sheets are now in official beta and with that available to all FSL users. Bear in mind that beta functionalities are intended for evaluation purposes only. Most probably the next Salesforce release will make this functionality generally available.

In addition this release will ease the scheduling of work to be done with Extended Match Work Rules that allows for deeper matching logic to be taken into account in your Scheduling Policies. Plotting reports with your most important customers on the map in the Dispatcher Console? You can now give them contrast by assigning specific colours and icons to make them appear that way on the map.



"Having been involved in many Field Service Lightning implementation projects I am happy to see more and more solutions that we needed to customly build in the past are now being added to the standard product. It surely enhances the speed in which we can roll out FSL in the future."

Jeffrey Schmidt, Senior Consultant & Field Service Lightning expert

3. Unleash your true Knowledge Centered Service potential

Lightning Knowledge is at the heart of Service Cloud's knowledge sharing capabilities and with this release it's being embedded even deeper into its core. The Winter '20 release ensures Knowledge Articles can now be shared with customers over all communication channels: Social Customer Service, Chat, Messaging and Email.

On top of that, as Einstein Chatbots are getting smarter they can now consult your Knowledge repository as well and proactively suggest articles that might help your customers with their queries. As well as the earlier mentioned Time Sheets functionality, Einstein Article Recommendations are in beta for now.

The screenshot shows the 'Einstein Article Recommendations' setup page. It has a progress bar with three steps: 'Select Fields' (active), 'Build Model', and 'Activate Recommendations'. Below the progress bar, there are three buttons: 'Select', 'Build', and 'Activate'. The 'Selected Fields' table is visible below the buttons.

Object	Model Input	Selected Field	Data Type
Case	Primary field	Subject	String
Case	Additional fields	Description	Text Area
Knowledge	Title field	Title	String
Knowledge	Summary field	Summary	Text Area
Knowledge	Additional fields	Assignment Note	Text Area

Einstein Article Recommendations

"Knowledge Centered Service is one of our core methodologies when innovating Customer Service departments. I'm glad to see the related Salesforce tools are being embedded deeper into the Service Cloud core."

Stef van den Oever, Practice Manager Service Cloud



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