The Future is AI:

Modern and Personalized CX
for Manufacturing

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Do you remember the days when your word was your bond and a handshake was as binding as a legal contract? These days, most companies prefer a more formal agreement. But a desire to develop trusting business relationships backed by things like quality products, transparent invoicing, and reliable shipping is timeless.

Beyond the contractual assurance of a handshake, there are escalating pressures for manufacturers to streamline their sales and shipping processes to fit customer and partner expectations.

Past global health and economic challenges alerted companies to take control of the sometimes volatile supply chains and inventory management to secure products and temper operation costs.

The emerging market space exposed the need for an advanced, more responsive system to help manufacturers scale without compromising business relationships. Gartner research shows that 80% of manufacturing CEOs plan to increase digital technology investments to counter current economic pressures, including inflation, scarce talent, and supply constraints.

Adopting a CRM system equipped with AI technology doesn't detract from the personalized, face-to-face customer service that has defined your brand. Instead, it takes those human, experienced-based instincts that help guide your customer and partner relationships and automates operations with data-backed technology.

In this ebook, we'll discuss AI solutions that address common challenges our manufacturing customers face. We'll explain how AI technology elevates organizational solutions with centralized, real-time data access, and automated CRM functionality equipped with AI capabilities.

We will highlight some proven user success stories with Salesforce and Infosys-backed products and customized strategies.

Finally, the launch of AI-backed GPT capabilities is transforming how companies build relationships with suppliers, partners, and customers, so we'll explore the impact AI/GPT capabilities have on the customer and partner experience.

Contents

Digital Transformation with AI is a Powerful Partnership

Can you feel the signs of change? You've likely heard about the push for digital transformation in the manufacturing industry.

Around 89% of all companies have plans or have already adopted a digital-first business strategy. With AI technology taking center stage, people have questions about these innovations and how using digital technology with AI can impact an organization's infrastructure.

Digital transformation refers to the integration of digital technologies, such as the Internet of Things (IoT), artificial intelligence (AI), and machine learning (ML), into various aspects of an organization's operations, processes, and services to improve efficiency, enhance customer experiences, and drive innovation.

The goal of this innovation is to transform data to provide smarter, usable information. Real-time data collection is essential for quality control and navigating supply chains and inventory. It empowers your teams to proactively deliver memorable customer and partner experiences that feel just like old times–only better.

By partnering AI technology with digital capabilities, businesses can make strategic decisions about infrastructure, workforce, and inventory, analyze cost-saving initiatives, and streamline project management.

Companies see immediate results from digital processes. For instance, just imagine the potential for better operations with connected sensors and devices on the factory floor collecting real-time data, allowing manufacturers to monitor and optimize operations, predict equipment failures, and enhance productivity. And that's just the beginning.

In this section, we'll list some of the more impactful benefits of digitizing foundational company operations.

We will also discuss ways AI-powered digital transformation is revolutionizing the manufacturing industry with cutting-edge technology that helps improve upon the good, old-fashioned, personalized experience in shockingly simple yet effective ways.

Improve Strategies with Data-driven Decision Making

Smart decisions require better data. With the proliferation of digital technologies, manufacturers can capture vast amounts of data across their operations.

Rich data can be analyzed and leveraged to make more informed decisions by identifying inefficiencies, optimizing production schedules, and improving overall productivity by using machine learning algorithms.

Armed with advanced analytics, predictive modeling, and AI algorithms your teams can identify data-based patterns, optimize processes, and anticipate maintenance needs, ultimately improving operational efficiency and reducing costs.

Win the Supply Chain Game

By enabling manufacturers to optimize their supply chain operations by analyzing data from various sources, such as demand forecasts, inventory levels, and quality control, AI algorithms can recommend optimal inventory levels, identify bottlenecks and preferred delivery routes, and improve efficiency while reducing costs.
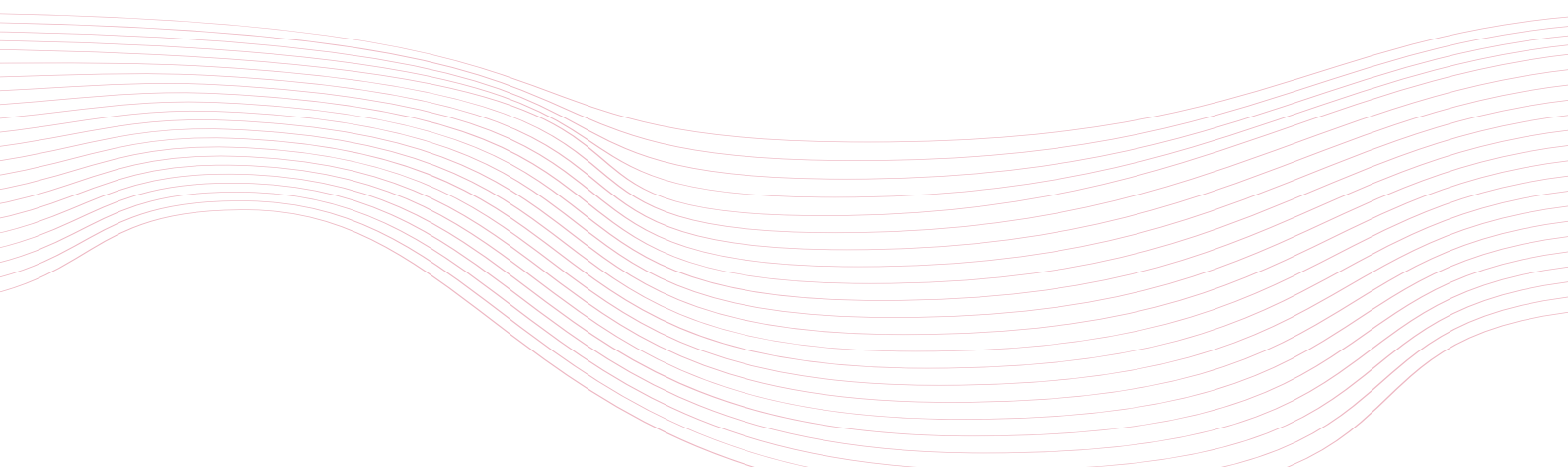
- **Demand Forecasting** relies on AI algorithms that analyze historical data, market trends, and customer/partner behavior to generate forecasts. An example is Salesforce's Manufacturing Cloud and its Advanced Account Forecasts feature

  This feature helps to summarize data from different CRM sources and provide a comprehensive customer/product forecast based on data available in Salesforce," explained **Jon Shea**, Principal Strategist at Simplus. "By itself, Advanced Account Forecasts can give reps easier access to committed volume (from Sales Agreements) and best case volume (from Opportunities) in one place allowing for quicker forecast review to support customer interactions."

  Shea added that Advanced Account Forecasts also provide a place for demand planning and ERP to communicate back with sales and CRM. "Consider a volume shortage scenario where data could be sent from ERP to CRM so that sales or service professionals can proactively communicate with their customers," he said. And that is a game-changer for supply management as well.

- **Supplier Management** elevates to cutting-edge status with real-time data analytics identifying high-performing suppliers and potential risks.

- **Quality Control** allows manufacturers to reduce errors, improve product consistency, and minimize waste by automating quality inspection processes. This enables manufacturers to detect potential equipment failures in advance, reducing downtime and optimizing maintenance schedules.

  Human error can spoil some of the most reliable operation models, which is why using AI algorithms to analyze real-time data from production lines to identify defects and anomalies can ensure higher quality control.

Integrate Robotics and Human Workflow with Process Automation

AI technology, including robotic process automation (RPA) and intelligent process automation (IPA), can automate repetitive or monotonous operations and time-consuming tasks. With tasks that require precision, robotics can eliminate human error.

Studies show that almost **90% of manufacturers** have formal plans to grow their workforce due to the rise of technology opportunities in the industry; a sign that digital transformation is the future of manufacturing. When companies can see a connection between operational obstacles and digital innovation solutions, factors like quality control, forecasting, supply chain channels, and overall productivity improve.

"In studying the rapid changes taking place in the manufacturing industry, we can gain a greater understanding of where the industry is going," said **Jerry Foster**, Chief Technology Officer & Cofounder of Plex, by Rockwell Automation. "It's critical to understand the objectives companies are pursuing through innovations, the challenges of achieving those objectives and how businesses can overcome those challenges through innovation."

At Simplus, we agree there's much at stake with this change. A successful digital transformation requires more than just installing the latest trending system and then sitting back, hoping to see improvements. It's why we've developed support teams that know the manufacturing industry and are ready to work with companies through every step of the journey.

It's much like that old-fashioned service your customers and partners love about your brand, and we back up our service with proven expertise, a solid reputation, a commitment to providing the best service possible, and a hearty handshake.

CHAPTER 2

Customer success stories with Salesforce, Simplus, and Infosys

Story #1:
AI Technology Pairs with
Quote-to-Cash Capabilities

With growing pressure to deliver immediate sales quotes and service, one of the most common challenges for our customers is implementing a system that provides accurate product, pricing, inventory, and shipping information on demand.

**Salesforce Experience Cloud
partners with AI technology to:**

01

Cut quote
creation time
(often in half!)

02

Improve forecasting
with better inventory
visibility

03

Enable faster
adoption

04

Support automated
tasks for a more
effective sales process

When **Holcim**, a leading innovative and sustainable building solutions company, needed to streamline its sales quoting processes, Simplus offered simple solutions with an upgraded Salesforce instance and CPQ implementation to seamlessly handle mass quoting and editing for every phase of the sales cycle.

AI Technology Expands CPQ Capabilities

Quote-to-cash software refers to the entire process of generating a sales quote, managing the sales process, and ultimately closing the deal and receiving payment. AI can enhance this process by automating tasks, improving accuracy, and providing insights for decision-making.

Here are some specific ways AI can support quote-to-cash software:

Automated Quoting. AI can analyze historical sales data, customer/partner information, and pricing structures to generate accurate and customized quotes automatically. This helps streamline the quoting process, reducing manual effort and improving efficiency.

Pricing Optimization. AI algorithms can analyze various factors, such as market demand, competition, customer/partner preferences, and historical sales data, to optimize pricing strategies. This ensures that quotes are competitive, maximizing revenue while maintaining profitability.

Sales Forecasting. AI can analyze historical sales data, market trends, and external factors to provide accurate sales forecasts. This helps sales teams and organizations make informed decisions, such as resource allocation, inventory planning, and revenue projections.

Contract Management. AI-powered contract management systems can analyze and extract relevant information from contracts, such as terms and conditions, payment schedules, and contract duration. This streamlines contract creation, review, and management, reducing the time and effort required to close deals.

Intelligent Sales Assistance. AI-powered chatbots or virtual sales assistants can provide real-time support to sales representatives throughout the quote-to-cash process. These assistants can answer questions, provide product information, suggest upsell or cross-sell opportunities, and guide salespeople in closing deals more effectively.

AI TECH + CPQ DELIVERS

01

Fast and accurate automated quoting

02

Competitive pricing per market demand and customer/ partner preferences

03

Trustworthy sales forecasting
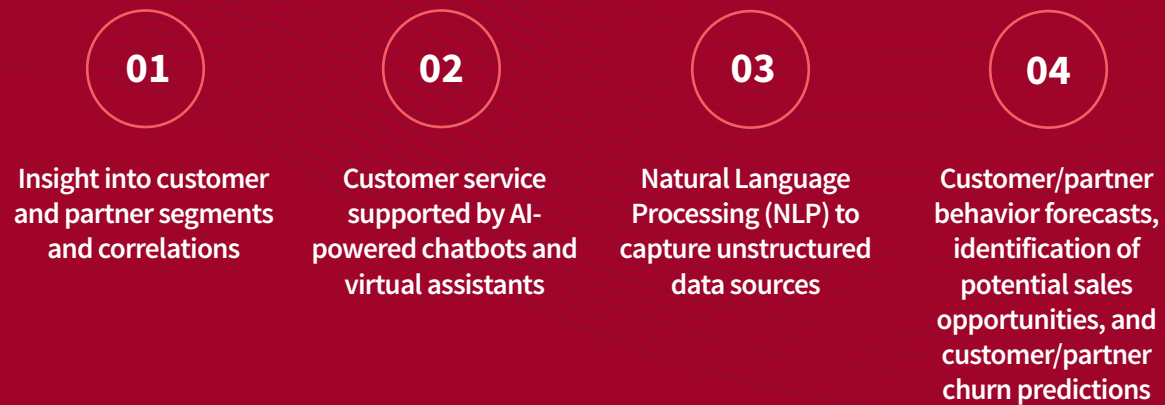
04

Automated contract management

05

Real-time customer/partner support through preferred channels

Story #2:
AI Technology Bolsters CRM and Advisory Services

During uncertain times, maintaining customer and partner relationships are more important than ever. But, with outdated manual workflow processes and siloed operations, it's hard for customers or partners to have confidence in your brand.

With AI Tech, Advisory Services Provides:

01

Insight into customer and partner segments and correlations

02

Customer service supported by AI-powered chatbots and virtual assistants

03

Natural Language Processing (NLP) to capture unstructured data sources

04

Customer/partner behavior forecasts, identification of potential sales opportunities, and customer/partner churn predictions

AI technology empowers Salesforce Advisory Services by providing valuable insights, automating repetitive tasks, and enhancing customer or partner engagement. It helps advisors deliver personalized experiences, make data-driven decisions, and maximize business outcomes. Here's an example:

For **Mitsubishi Electric Automotive America** (MEAA), a leading manufacturer and supplier of powertrain products, body and chassis products, and in-vehicle entertainment systems for the automotive industry, the customer is king. But faced with outdated, siloed processes that limited access to customer information and resources, MEAA knew it needed a modern content management system for better tracking capabilities and to centralize data storage. By building out a cutting-edge CRM solution supported by AI technology, Simplus Advisory Services and MEAA were able to ensure seamless user adoption.

AI Technology Bolsters CRM and Advisory Services

With advanced analytics, intelligent automation, and personalized recommendations, here are some ways organizations can ensure the customer stays top of mind throughout the sales cycle.
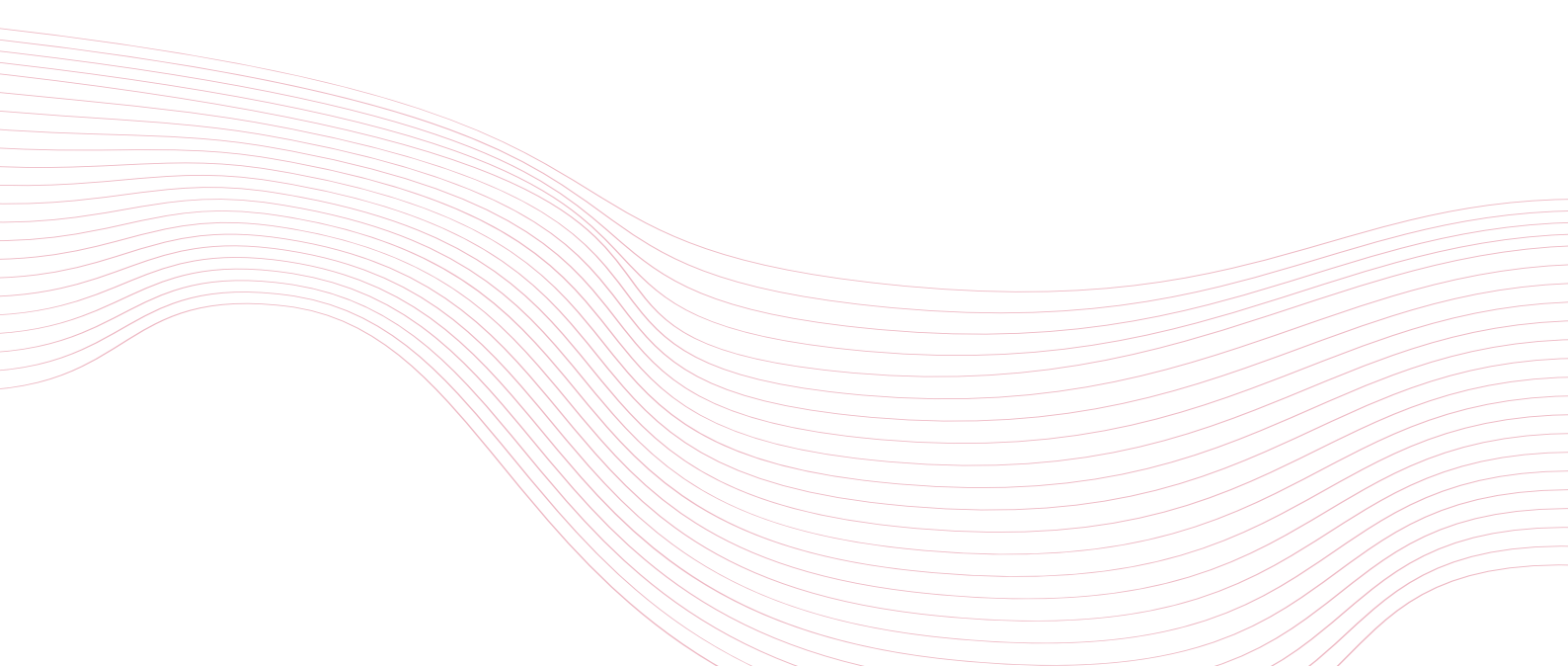
Natural Language Processing (NLP) enables AI systems to understand and interpret human language, allowing advisors to extract insights from unstructured data sources like emails, social media posts, and customer feedback. NLP also facilitates sentiment analysis, helping advisors gauge customer or partner sentiment and address any issues or concerns promptly.

Personalized Recommendations. AI technology can analyze customer and partner preferences, purchase history, and interactions to generate personalized product recommendations. Advisors can leverage these recommendations to offer tailored solutions and upsell or cross-sell relevant products or services to customers and partners, thereby increasing satisfaction and revenue.

Chatbots and Virtual Assistants. AI-powered chatbots and virtual assistants can handle routine customer and partner queries, provide self-service options, and assist with basic tasks. This frees up advisors' time to focus on more complex and strategic activities, while customers and partners receive prompt responses and support.

Workflow Optimization. AI technology can optimize workflows by intelligently routing tasks, automating approvals, and prioritizing work based on urgency or relevance. This streamlines the advisory process, improves productivity, and ensures efficient collaboration within advisory teams.

Predictive Analytics. AI-powered predictive models can forecast customer or partner behavior, identify potential sales opportunities, and predict customer or partner churn. By leveraging historical data and applying machine learning algorithms, advisors can make data-driven recommendations and strategies to enhance experiences and drive sales.

CHAPTER 3

Using GPT, AI, and Data Clouds to Accelerate Customer and Partner Relationships

Einstein? Can you map out the future of customer success?

We've been hearing a lot about the transformational impact of CRM built on real-time data management and AI technology in all major industries.

It's timely.

In a matter of months, terms like AI and GPT have become household names, even prompting a new field called prompt engineering. The transformative potential of these applications ranges from literary to simplifying manufacturing processes to automating healthcare services and patient engagement.

Almost all (**97.2 percent**) organizations plan to invest in big data and AI technology soon. They've seen the positive impact AI-based CRM offers their workforce as much as their customers.
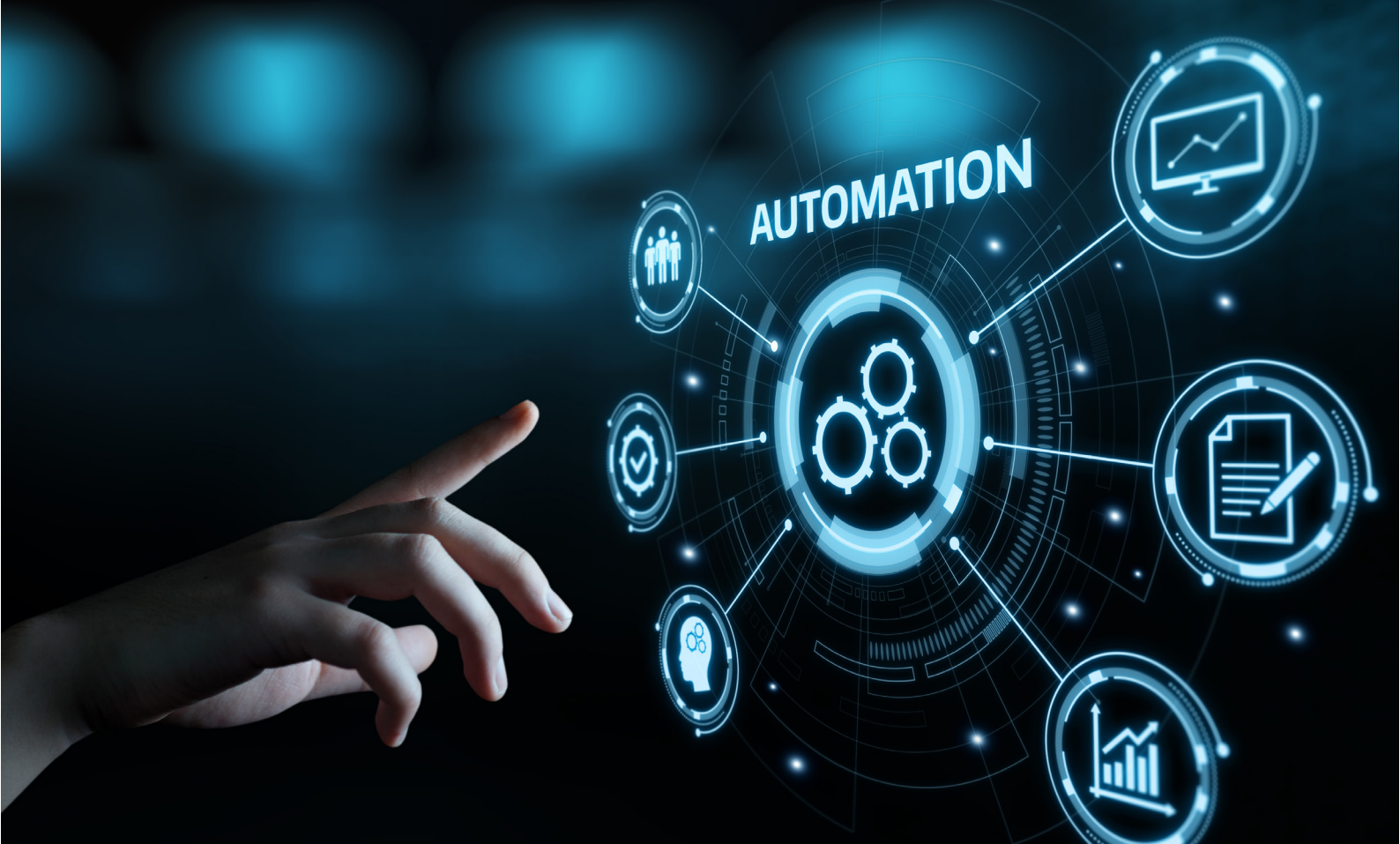
"Digital platforms that can not only centralize all communications across the various channels but also integrate into other aspects of the business such as the shipping or marketing departments can provide agents with easier and faster access to data and allow them to multitask with less stress," says **Eli Israelov**, co-founder of Commbox, and a Forbes contributor.

With AI-backed CRM, customer service strategies can seamlessly move from reactive strategies to proactive engagement, elevating customer satisfaction. With GPT and automated workflow, organizations can take personalization in customer or partner engagement to unprecedented, headline-worthy levels.

In this chapter, we'll explain why using Salesforce Data Cloud with EinsteinGPT, Salesforce Flows for your CRM, and Infosys Topaz are all viable ways to help your organization collect and analyze data—data that empowers you to understand customers and partners better.

First things first: Einstein with Salesforce.

Salesforce Einstein

Einstein is a suite of generative AI tools that integrates with Salesforce offerings such as Data Cloud, Tableau, Flow, and MuleSoft.

- Auto-generate personalized emails, customer/partner replies, and case summaries.

- Auto-generate personalized content creation for email, mobile, web, and marketing campaigns.

- Create insights and recommendations for customized commerce experiences at each touchpoint of the buyer's journey.

- Generate predictive analysis to troubleshoot code bugs and fixes.

- Prevent large-learning models (LLMs) from retaining customer data with the Einstein GPT Trust Layer. This safeguards customer data and ensures AI models are fair and unbiased.

- Integrates OpenAI with CRM.

Throughout this chapter, we'll go into more detail on some of the specific subfunctions of Einstein like Data Cloud, Flow, and GPT.
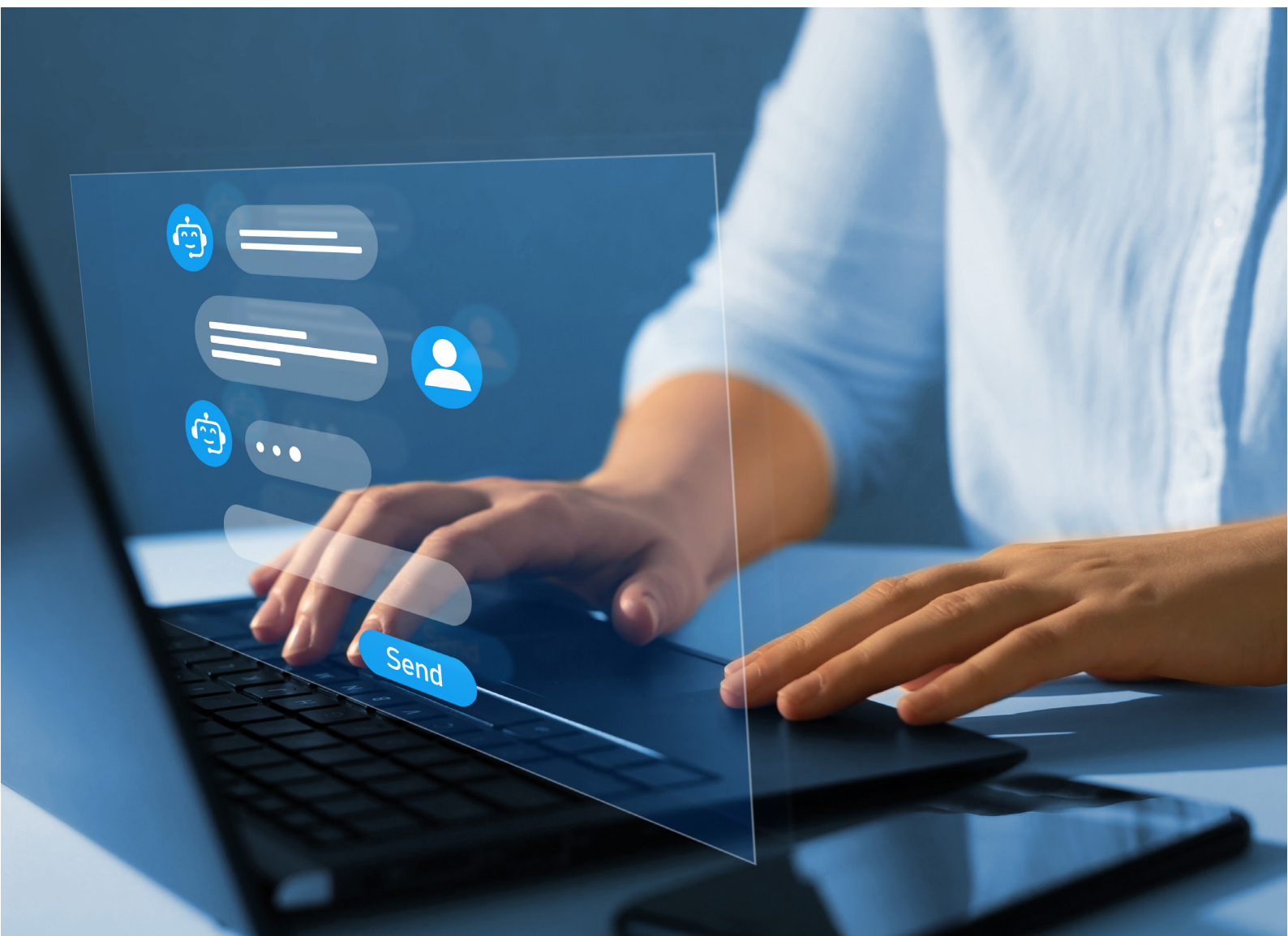
Data Cloud

The primary appeal of Salesforce Data Cloud can be summed up in two words: Real-time.

By utilizing customer or partner data collected within milliseconds, brands can respond to customers and partners with immediate service, product upselling opportunities, discounts, promotions, and more.

It also empowers meaningful collaboration among departments and teams, allowing them to respond collectively to real-time data on sales, service, marketing, or commerce.

"Before Data Cloud, Salesforce was built to deal with mostly transactional data," explained **Sanjna Parulekar**, a Salesforce Data Cloud expert. "The addition of Data Cloud complements our existing transactional database with the ability to take in massive volumes of data in real-time. Like all other Salesforce platform features, Data Cloud is built using Salesforce metadata, meaning data stored in Data Cloud is visible and available to be used by Customer 360."

Adding GPT capabilities to the Data Cloud platform opens up new sales engagement opportunities.

Einstein GPT

When Salesforce introduced Einstein, the first comprehensive AI technology designed for CRM, in 2016, it transformed the functionality of Salesforce 360.

In March 2023, Salesforce announced the next generation of AI technology with Einstein GPT. Adding the GPT feature means customers can use natural-language prompts based on CRM data to deliver personalized and automated AI-generated content.

Experts estimate that Salesforce Einstein generates around **200 billion predictions every day**.

What does this look like for customers? In a recent interview, Jayesh Govindarajan, Salesforce's Senior Vice President of AI and Machine Learning at Salesforce, shared three significant advantages.

Consider the nature of generative AI in the workplace. Your sales and service teams can compose emails and schedule meetings using auto-generation. Teams can also auto-generate personalized agent chat replies for improved customer and partner satisfaction and engagement through personalized and expedited service interactions.

"The second is our technology," says Govindarajan. "Salesforce can be a powerful multiplier of generative AI experiences because Einstein GPT blends public data with CRM data, and when several million of our customers are all using Einstein GPT, the model gets refined with each instance and becomes more accurate. It's a cumulative effect and is really a huge differentiator for Salesforce."

Using a single platform, users can ask questions, make a request, and then take action. For example:

Einstein? Can you show me the top sales contacts with our leading distributors of service parts?
(Yes. Yes, it can.)

Einstein? Can you create a lead generation form for process manufacturing requests in these zip codes?
(Yep.)

Einstein? What is the best reply for this customer service request for warranty and entitlement details?
(Insert applause here.)

Salesforce Flow

To get the most value from your CRM, sales, service, marketing, and e-commerce must share a single view of the customer, partner, supplier, or distributor. You must respond to activity as it happens to create meaningful customer and partner engagement. Salesforce Flow automates complex workflows and triggers actions based on real-time changes, such as an abandoned online shopping cart or a customer/partner repeatedly clicking on a product. A marketing automation system can trigger an immediate follow-up email with a personalized discount code to encourage them to complete their purchase.

"Flow helps customers quickly automate complex business processes across any system, and today is delivering 1 trillion monthly automation and saving customers 109 billion hours every month," said **John Kucera, SVP of Automation, Salesforce**. "By powering Flow with Einstein and GPT and Data Cloud, we're not only enhancing usability but also ensuring our customers have access to the most advanced tools to achieve even more productivity, efficiency, and growth. This democratizes enterprise AI for everyone."
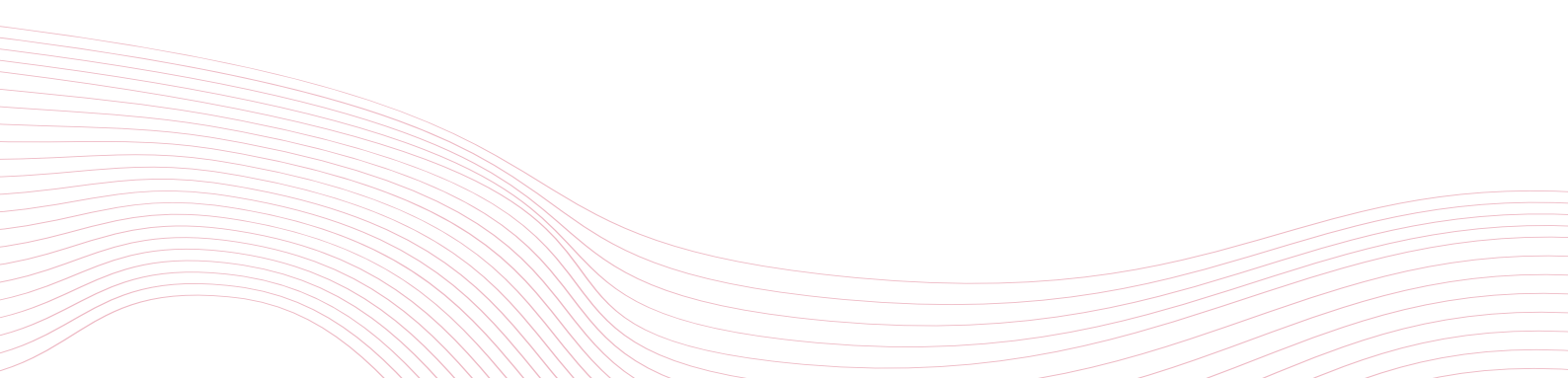
Infosys Topaz

Now that we've covered all of the AI features offered through Salesforce, we want to introduce you to another AI-based tool from Infosys. Infosys Topaz is bringing generative AI, analytics, and cloud all together for innovative business offerings. For manufacturers, Topaz is especially helpful for boosting partner relationship management, contact center productivity, and field service efficiency.

- Equipped with a Contact Center Intelligence solution that encompasses conversational analytics, call intent prediction, agent performance analysis, and sentiment analysis.

- Installed with the automation and orchestration of over two thousand processes, previously taking weeks to complete, were accomplished for near real-time fulfillment.

- Equipped with MLOps principles and blueprints for deploying different patterns, such as a real-time model-serving batch, utilizing cloud-native principles. This approach ensures the solution is highly portable, enabling deployment on-premises and across various cloud providers like Azure and GCP.

- A "responsible by design" approach ensures uncompromising ethics, trust, privacy, security, and compliance.

With Topaz, Infosys brings the power of generative AI, analytics, and cloud together to accelerate its own market offering evolution, and enterprise transformation to improve client services, reimagine business processes, and software engineering, and boost productivity. The impact of AI technology on manufacturing industries in driving digital transformation is undeniable. From fueling innovation and enhancing efficiency for more effective UX to revolutionizing customer and partner experiences, AI technology is reshaping the landscape of manufacturing. As organizations continue to embrace AI and leverage its capabilities, they will be well-positioned to thrive in the dynamic and ever-evolving digital era.

Today's digital innovations are guiding the future of customer and partner success. By implementing generative AI CRM technology and backing it with Salesforce Flow, your sales and marketing teams can create a fully automated conversational interface that simplifies workflow processes that connect with customers and partners alike.

CONCLUSION

With today's digital technology, manufacturing businesses can offer customers and partners a trusting handshake and so much more. It's a pivotal opportunity amid a growing competitive market where innovation is essential for success.

"While digital transformations are notoriously difficult to scale up across networks of factories, the pressure to succeed is intense," observed Ewelina Gregolinska, Rehana Khanam, Frédéric Lefort, and Prashanth Parthasarathy, who have tracked the impact of **Industry 4.0** and digital transformation in this industry.

"Companies at the front of the pack are capturing benefits across the entire manufacturing value chain—increasing production capacity and reducing material losses, improving customer service and delivery lead times, achieving higher employee satisfaction, and reducing their environmental impact. Scaled across networks, these gains can fundamentally transform a company's competitive position."

They added that with so much at stake, manufacturers are putting significant time and money behind their digital transformations. "These investments are paying off for some, but most remain unable to scale successful pilot programs or fully leverage new tools and technology to see meaningful returns," they said.

Simplus understands the need for rapid transformation in an evolving industry. We've been working with companies just like yours to ensure your business goals are moving forward with the right Salesforce configurations and expert support.

We value these relationships. And we are excited about the potential AI technology and GPT has to elevate front-to-back office operations for manufacturing companies. If you'd like to keep learning about whether or not AI is right for your organization, what the next steps are, or how to implement, our team of experts is standing at the ready. Let's chat about how to get more value from your existing tech stack, increase sales, and foster long-term relationships with a competitive AI edge.

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