UiPath Solutions for Salesforce®

Extend the value of Salesforce® solutions with UiPath Robotic Process Automation

Peter Villeroy (Director Of Enterprise Applications Practice, UiPath)

Jonathan Santino (Senior IT Development Manager, Tavistock)

Jeff Peng (Pre-Sales Engineer, UiPath)

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Panelists

Peter Villeroy
UiPath

Jonathan Santino
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Jeff Peng
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Moderator

Today's Agenda

- Extend the value of Salesforce solutions with UiPath (Peter Villeroy)
- The Tavistock Story (Jonathan Santino)
- UiPath-Salesforce Connector Demo (Jeff Peng)

- Q&A (Moderator and Panelists)

Chris Hall
UiPath

Companies continue to invest in new tech – and work becomes complicated across systems

88
average number of enterprise applications for a given company

20%
Three-year increase in applications per company

Downstream Impact

⚠ Processes involve multiple tools and lines of business

⚠ Need for bespoke integrations to connect systems – often at high costs

⚠ Processes are time-consuming and error-prone

⚠ Risk of data inconsistency across systems

While most companies recognize the importance of automation, they struggle to automate work across systems

UiPath
Reboot Work.™

93%
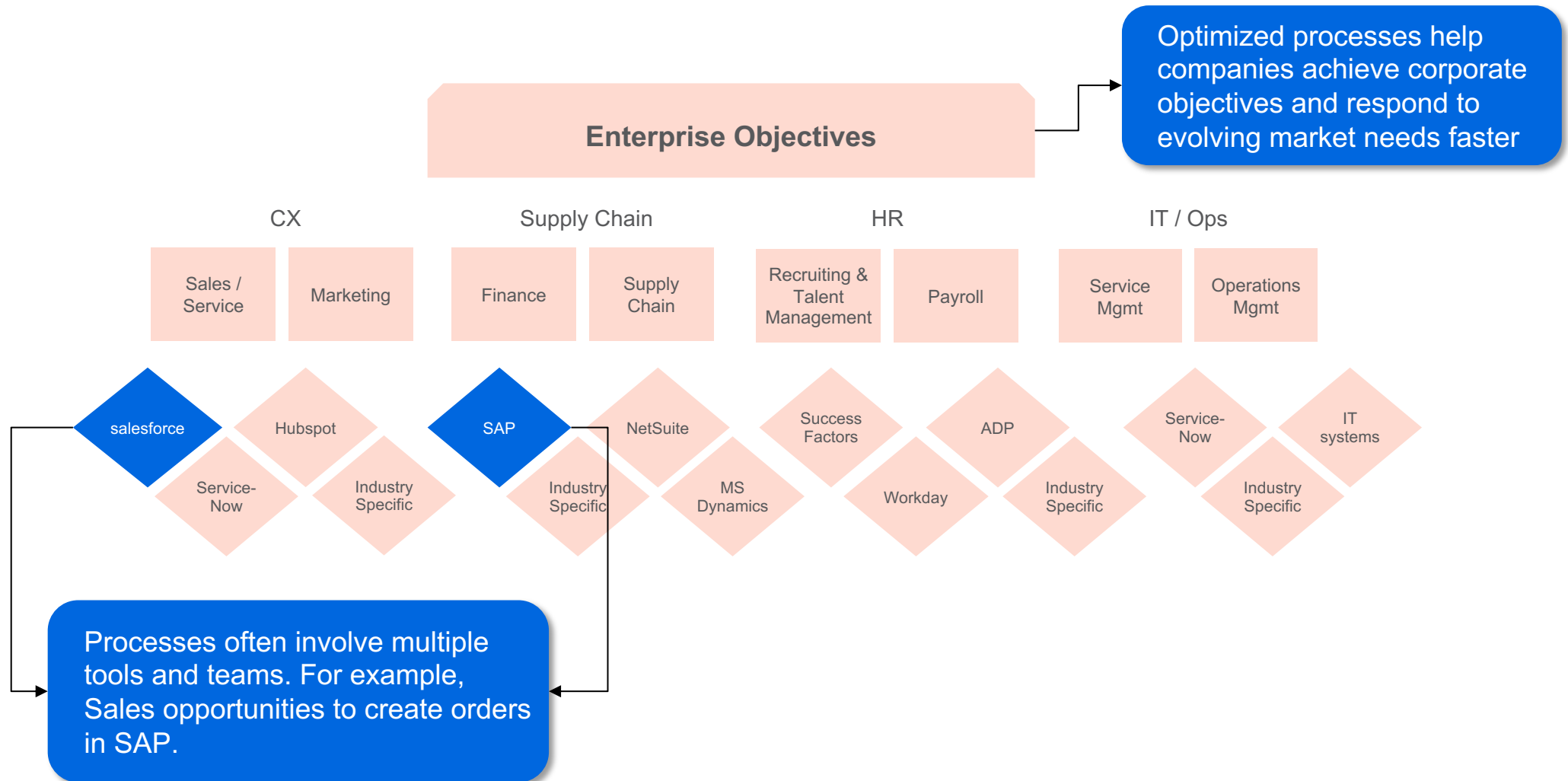say automation is an important driver of future business success, yet…

89%
say they are not invested sufficiently in automation

Top 3 barriers to automation adoption

1. Resourcing & skills challenges

2. Lack of strategy or governance

3. Lack of integration capabilities

*2019 UiPath survey; n=309

Streamlined processes across functions and applications enable an agile, digital org

Enterprise Objectives

Optimized processes help companies achieve corporate objectives and respond to evolving market needs faster

CX	Supply Chain	HR	IT / Ops

Sales / Service

Marketing

Finance

Supply Chain

Recruiting & Talent Management

Payroll

Service Mgmt

Operations Mgmt

salesforce

Hubspot

Service-Now

Industry Specific

SAP

Industry Specific

NetSuite

MS Dynamics

Success Factors

Workday

ADP

Industry Specific

Service-Now

Industry Specific

IT systems

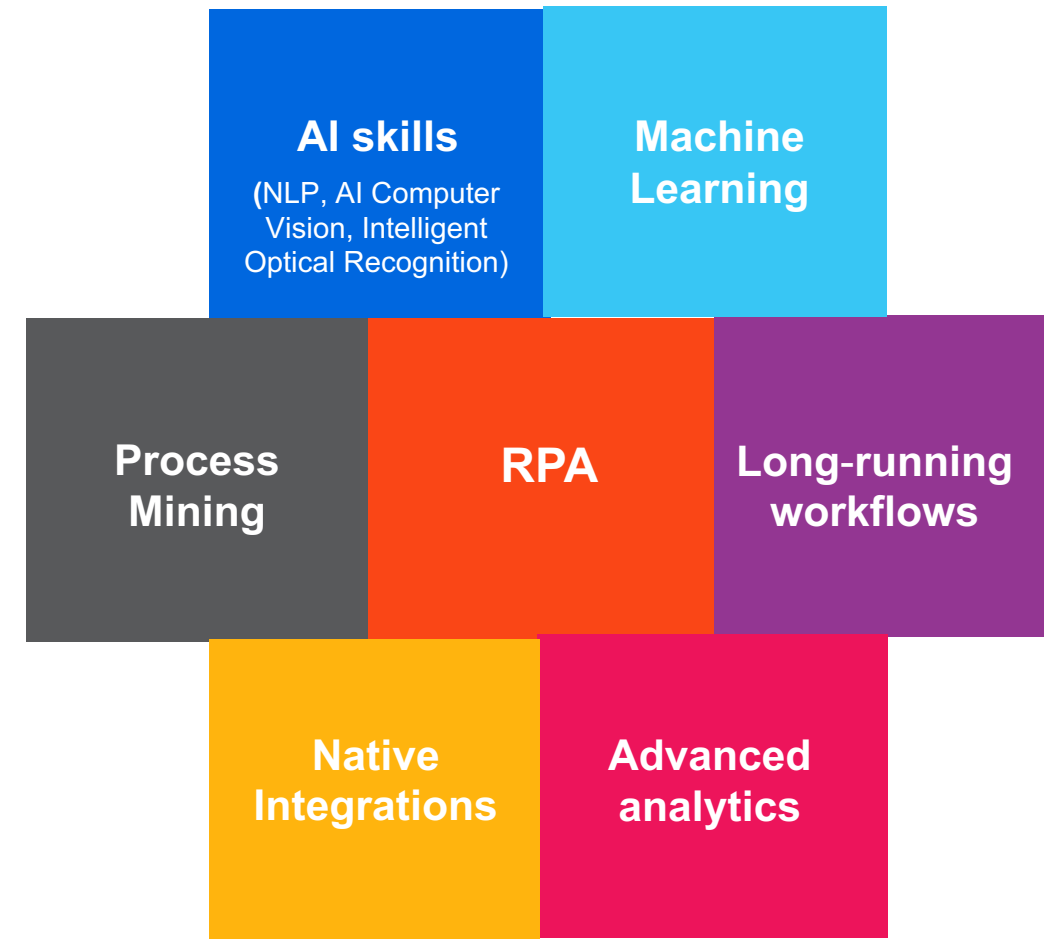Processes often involve multiple tools and teams. For example, Sales opportunities to create orders in SAP.

Automate all possible business processes, end-to-end

Hyperautomation: trend #1 on Gartner's list of Top 10 Strategic Technology Trends for 2020

"The combination of multiple machine learning, packaged software and automation tools to deliver work. (...) Hyperautomation refers not only to the breadth of the palette of tools, but also to all the steps of automation itself: discover, analyze, design, automate, measure, monitor, reassess."
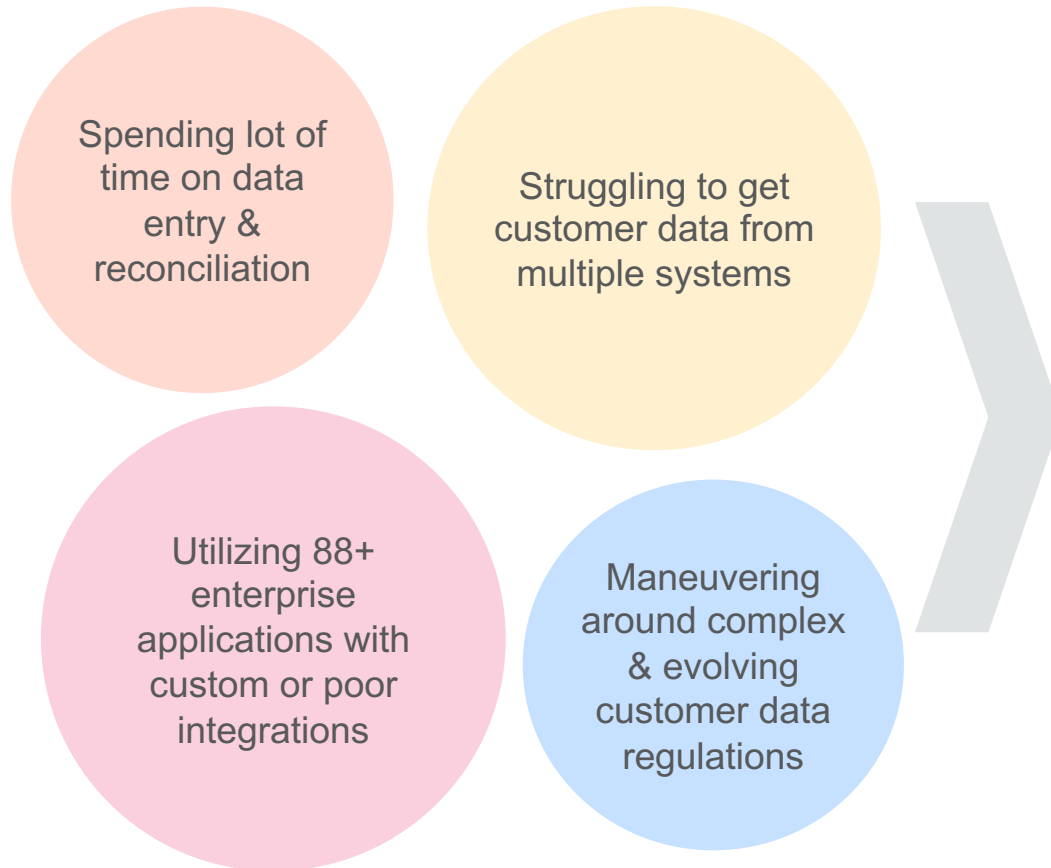
- Gartner, Top 10 Strategic Technology Trends for 2020

AI skills (NLP, AI Computer Vision, Intelligent Optical Recognition)

Machine Learning

Process Mining

RPA

Long-running workflows

Native Integrations

Advanced analytics

Customer experience processes are often manual, complex, and span many systems, risking low-quality experiences

Today's Digital Reality

Spending lot of time on data entry & reconciliation

Struggling to get customer data from multiple systems

Utilizing 88+ enterprise applications with custom or poor integrations

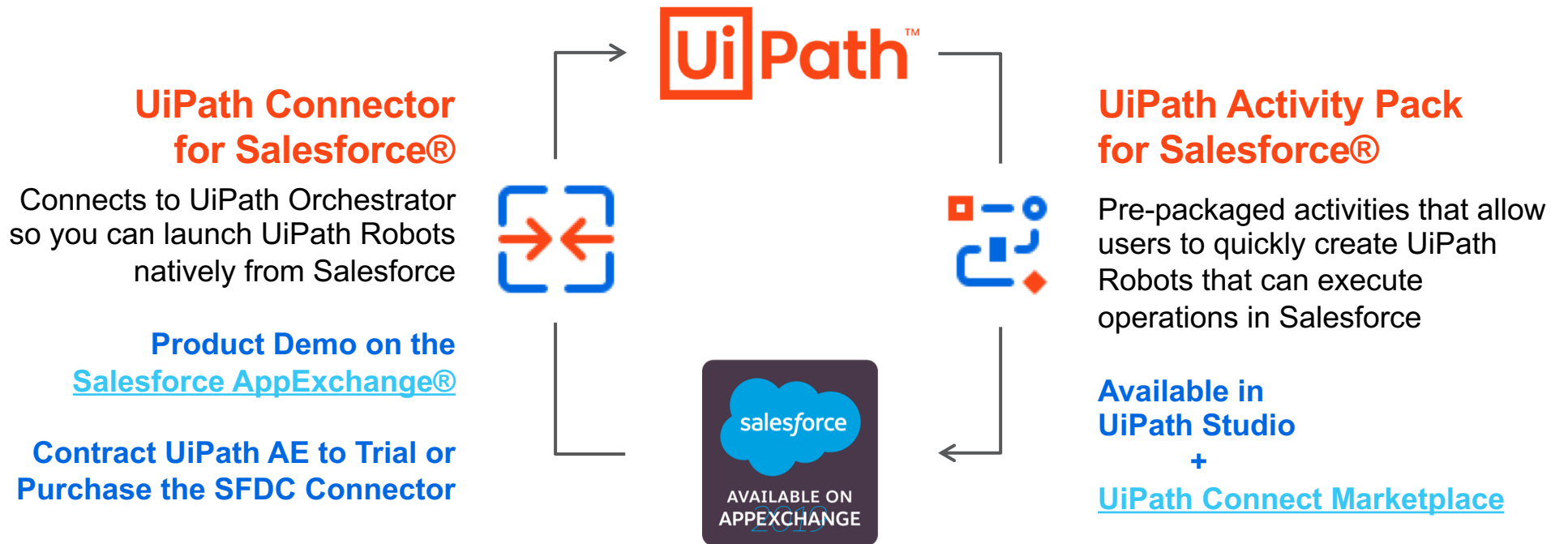Maneuvering around complex & evolving customer data regulations

Downstream Impact

Inconsistent and low-quality customer experiences

Frustrated employees doing manual work

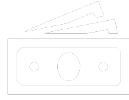**Bespoke integrations or costly development to connect systems**

Dynamic integration enables Salesforce users* to seamlessly add UiPath RPA to their Salesforce experience

UiPath Connector for Salesforce®

Connects to UiPath Orchestrator so you can launch UiPath Robots natively from Salesforce

Product Demo on the Salesforce AppExchange®

Contract UiPath AE to Trial or Purchase the SFDC Connector

UiPath Activity Pack for Salesforce®

Pre-packaged activities that allow users to quickly create UiPath Robots that can execute operations in Salesforce

Available in UiPath Studio

+

UiPath Connect Marketplace

Utilizing the UiPath Connector for Salesforce has dependency on owning Orchestrator

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UiPath Connector for Salesforce:
Works across many* leading Salesforce products

Sales Cloud

salesforce sales cloud

- Lead Import
- Invoice / payment processing beyond closed won opportunities
- Document creation

Service Cloud

salesforce service cloud

- Single view of the customer (Contact Center)
- Service level validation (internal and external)

Health Cloud

salesforce health cloud

- Estimated to be 10% ($2.1B) of CRM business ($22B)
- EMR integration
  - API based
  - User interface based

Salesforce Admin

salesforce

- Provision / deprovision users
- Password resets
- Roles and profiles updates
- Data quality / duplicates
- Release Management

Does not work with Marketing Cloud

Customer Core Benefits

Improve productivity

Automate critical customer experience processes in Salesforce

Easily create world-class automations across Salesforce Sales Cloud®, Service Cloud®, Finance Cloud®, and Health Cloud®

Unlock the full power of Salesforce

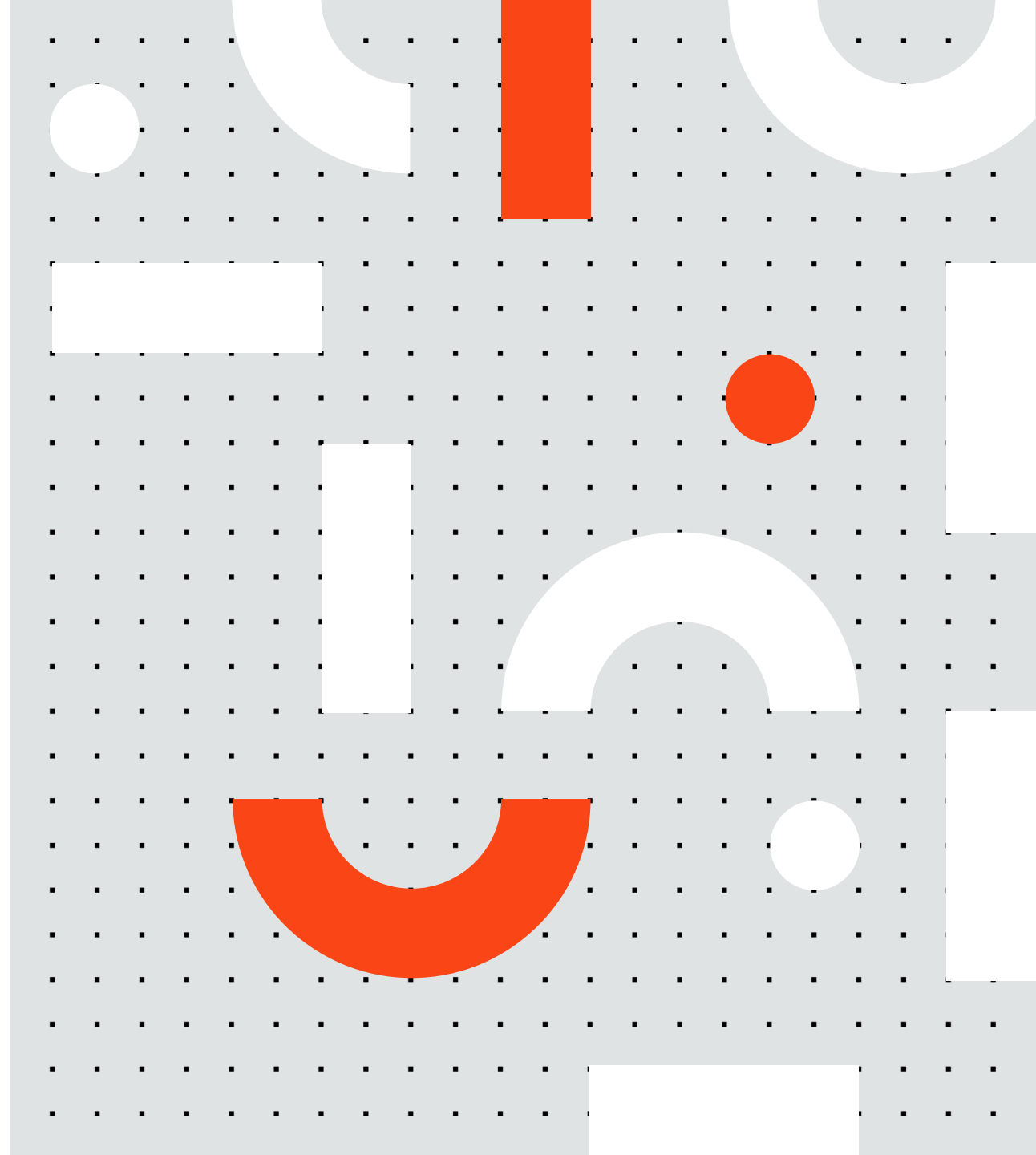**Streamline complex workflows that involve multiple systems**

Automate multi-system, complex, end-to-end processes not just in Salesforce, but across multiple functions, business units, and technologies

Accelerate ROI

Deploy and manage automations with ease, without costly development

See faster time-to-value with easy implementation; no need for costly, bespoke custom development
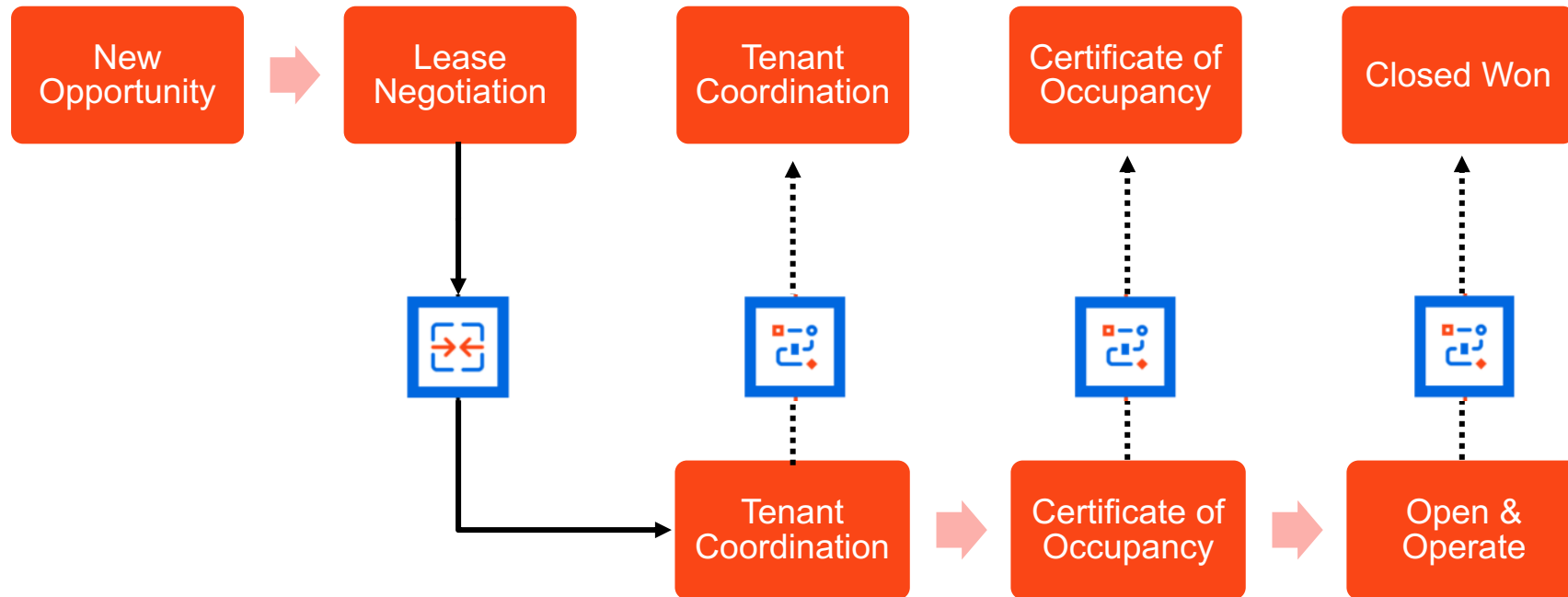
Use Cases &
Customer Story

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TAVISTOCK DEVELOPMENT COMPANY

REIMAGINING COMMUNITY, EXPERIENCE AND INNOVATION

- Diversified real estate firm specialized in planning, design, finance, and construction

- Lake Nona - one of the best-selling master designed communities in America
  - Named the "Future of Cities" by Fortune magazine

- Emphasis on residential, commercial, health / wellbeing, sports, and hospitality

Sales

New Opportunity → Lease Negotiation   Tenant Coordination   Certificate of Occupancy   Closed Won

Tenant Coordination → Certificate of Occupancy → Open & Operate

UiPath Connector

Salesforce Activities

smartsheet

Project Delivery

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UiPath Value Add

Increased visibility bringing key data from Salesforce to Smartsheet & vice versa
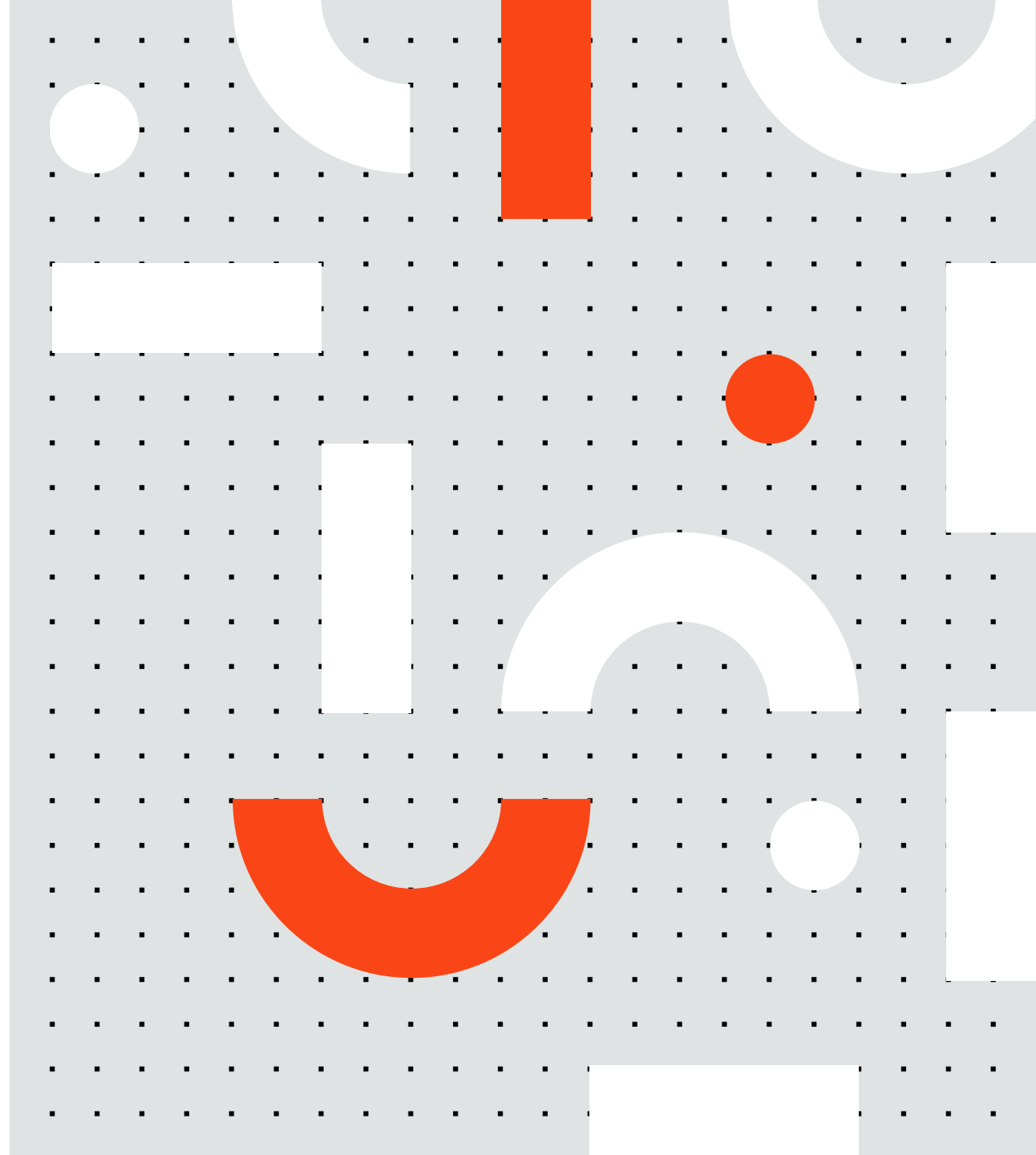
Since December '19 over 315 project updates were automatically processed across 45 different projects

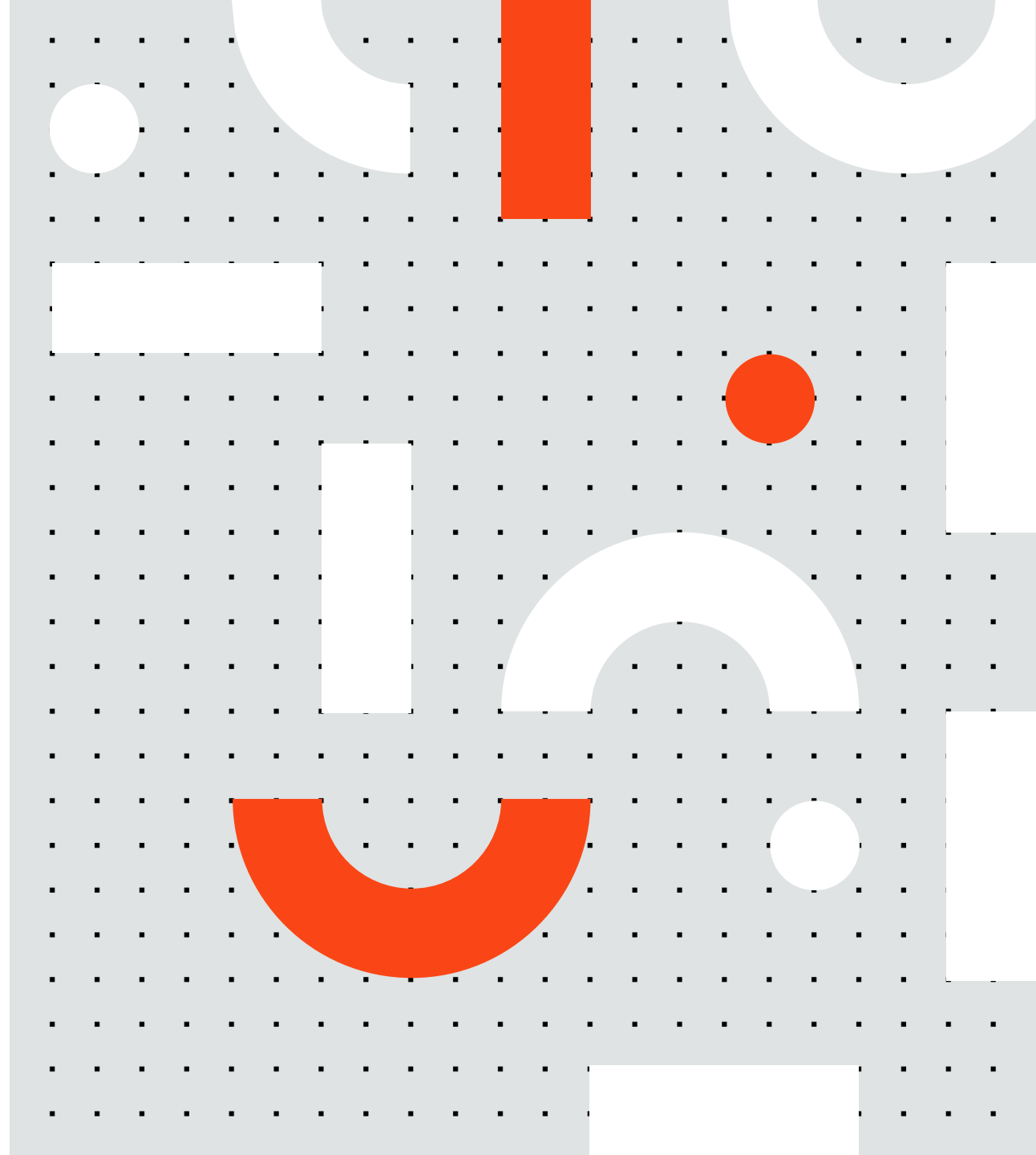- **Estimated savings of about 4 full weeks of work over the span of 1 year**

Helping to break silos between our project delivery team and our sales team which results in an overall better customer AND employee experience

Demo:

Jeff Peng

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Q&A

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Resources and Links:

- **Reach out to your Account Executive to Trial and Purchase the UiPath Connector for Salesforce**

- **Find the UiPath Connector on the Salesforce AppExchange:**
  https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FtSNwUAN

- **UiPath Salesforce Activity Pack**
  https://connect.uipath.com/marketplace/components/salesforce-activity-pack

- **UiPath Salesforce documentation**
  https://docs.uipath.com/integrations/docs/salesforce-about

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Thank you!

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