



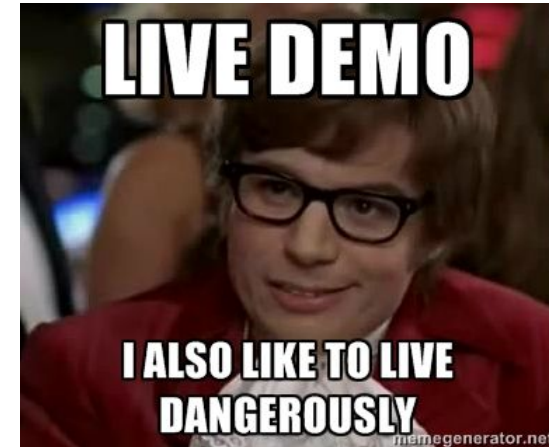
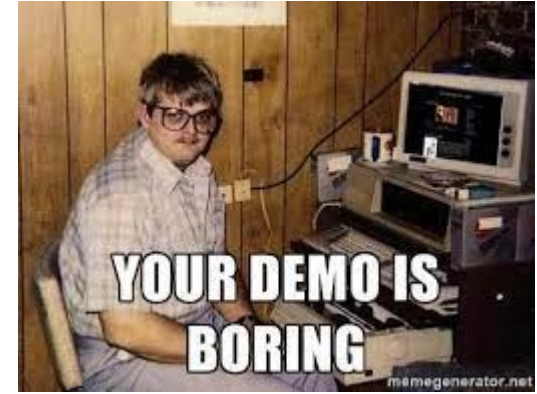
Salesforce Scheduler and more

Presented and compiled by
Svet Voloshin



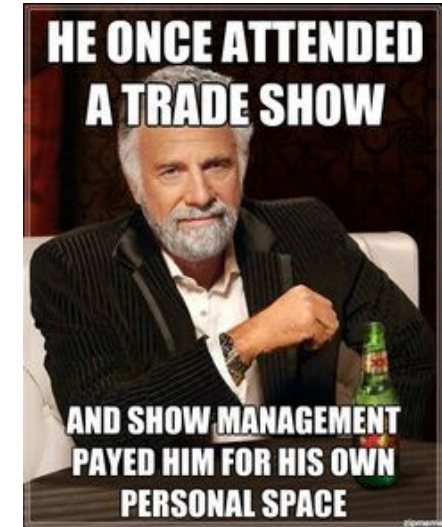
How to demo...

1. **Understand your audience:** Before the demo, it's important to understand who your audience is and what their needs and pain points are. This will help you tailor the demo to their specific interests and demonstrate how Salesforce can help them solve their problems.
2. **Focus on the most relevant features:** Don't try to demo every feature of Salesforce. Instead, focus on the features that are most relevant to your audience and their needs. Highlight how these features can solve their challenges and improve their workflow.
3. **Use a scenario-based approach:** Instead of just showing features in isolation, use a scenario-based approach to show how different features work together to solve a specific business challenge. This can help the audience see the bigger picture and understand how Salesforce can help them achieve their goals.
4. **Use real data:** Use real data that is relevant to your audience and their industry. This can help make the demo more realistic and relatable.
5. **Keep it interactive:** Encourage audience participation by asking questions, showing how they can use the features, and allowing them to try things out themselves. This can help keep them engaged and interested in the demo.
6. **Highlight key benefits:** Throughout the demo, make sure to highlight the key benefits of using Salesforce. This can include increased productivity, improved collaboration, and better customer insights.
7. **Keep it concise:** Don't drag the demo on for too long. Keep it concise and to the point, focusing on the most important features and benefits. This will help keep the audience engaged and prevent them from getting overwhelmed with too much information.



How to Demo at Trade Shows

1. **Keep it simple:** Trade show attendees are often busy and distracted, so it's important to keep your demo simple and to the point. Focus on the most important features and benefits of your software.
2. **Use visuals:** Use visuals like screenshots, videos, and graphics to help illustrate your software's features and benefits. This can help grab attendees' attention and make the demo more engaging.
3. **Show, don't tell:** Instead of just talking about your software, show attendees how it works. Use a live demo to demonstrate key features and show how they can be used in real-world scenarios.
4. **Be prepared:** Make sure you're prepared for the demo by rehearsing beforehand and having all the necessary equipment and materials ready. This includes a laptop, projector, and any other tools you'll need to run the demo.
5. **Engage the audience:** Keep the audience engaged by asking questions, soliciting feedback, and encouraging participation. This can help make the demo more interactive and memorable.
6. **Tailor the demo to the audience:** Make sure the demo is tailored to the specific audience you're targeting. This means understanding their needs and pain points, and demonstrating how your software can help solve their challenges.
7. **Follow up:** After the demo, make sure to follow up with attendees and provide them with additional information about your software. This can include a summary of the demo, case studies, or other materials that help reinforce the benefits of your software.
8. **Be available:** Make sure to be available to answer questions and provide support to attendees after the demo. This can help build trust and credibility with potential customers.



Demo Environment - DC World Tour



- Audience: **Public Sector - U.S. Government employees**
- Public Service-centric Experience Cloud Site
- Self-Service Portal
- Focusing on scheduling a vaccination appointment using Salesforce Scheduler for **guest users** (unauthenticated)
- Einstein Chat Bots to assist in scheduling for **logged-in users**
- Einstein Chat Bots to find relevant **Knowledge Articles**
- Service Cloud Voice to handle **voice calls, queues, call recording and transcription**
- Prep time: ~3 weeks
- Demo team: 2 Technical Architects
- Demo location: company booth at the [DC Convention Center](#)



SALESFORCE SCHEDULER

- Salesforce Scheduler, formerly Lightning Scheduler, gives you the tools to simplify appointment scheduling in Salesforce.
- Create a personalized experience for scheduling customer appointments
 - in person
 - by phone
 - via video
 - with the right person at the right place and time.
- Optimize resource scheduling by using advanced features
 - Appointment distribution
 - Service resource filtering
- Provide appointment booking experience from
 - Salesforce Lightning Service Console
 - Experience Cloud sites
 - and your company websites.

Salesforce Experience Cloud



- Salesforce Experience Cloud is a platform for creating and managing customer-facing digital experiences.
- It allows companies to build and customize portals, websites, and mobile apps for their customers, partners, and employees.
- It includes features like personalized content, self-service portals, community forums, and chatbots.
- Experience Cloud can be integrated with other Salesforce products, like Sales Cloud and Service Cloud, to provide a seamless experience across multiple channels.
- It includes tools for analytics and reporting, so companies can track and measure the success of their digital experiences.
- Experience Cloud is built on the Salesforce platform, so it inherits the security and compliance features of the Salesforce ecosystem.

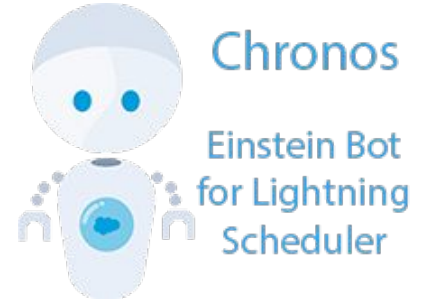
Einstein Chat Bots



- Salesforce **Einstein Chat Bots** is a feature of the Salesforce platform that allows companies to **create and deploy chatbots for customer service and sales**.
- It uses **artificial intelligence and natural language processing** to understand and respond to customer inquiries and requests.
- Chatbots can be deployed on a **variety of channels, including websites, mobile apps, and messaging platforms** like Facebook Messenger and WhatsApp.
- Einstein Chat Bots can be **customized** to match a company's **branding and voice**, and can be **programmed to handle a wide range of tasks and queries**.
- It can be **integrated with other Salesforce products**, like **Service Cloud** and **Sales Cloud**, to provide a seamless customer experience across multiple channels.
- Einstein Chat Bots can be trained using machine learning, so they can learn from customer interactions and improve over time.
- It includes features like proactive messaging, sentiment analysis, and conversation routing, to provide a personalized and efficient experience for customers.
- Chatbots can be designed to handle a wide range of use cases, from simple FAQs to complex transactions and requests.
- It can be monitored and analyzed using Salesforce reporting and analytics tools, so companies can track the success of their chatbot deployments and make data-driven improvements.

Scheduling Appointments via Chat Bots?

- Why? If done correctly, this simplifies the user experience by offering consistency across experiences
- Developed by [Marc Hutchinson](#), when he was at Salesforce
- Part of [Salesforce Labs](#)
- Video Demo: [Extend Lightning Scheduler With Chronos Chatbot](#)



[Marc Hutchinson](#)

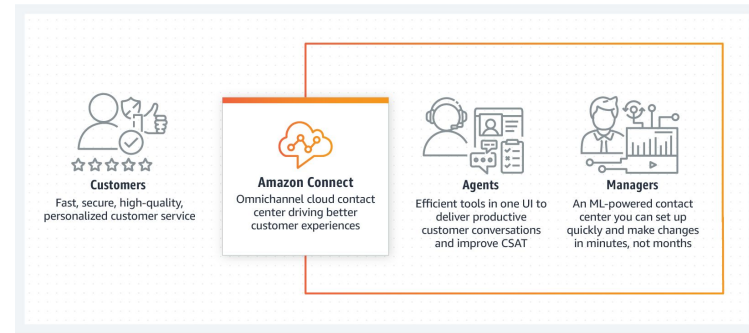


Service Cloud Voice



- Salesforce Service Cloud Voice is a feature of the Salesforce platform that allows companies to **integrate voice channels** into their customer service operations.
- It provides a unified platform for managing **phone and chat interactions** with customers, all within the Salesforce interface.
- Service Cloud Voice can be integrated with a **variety of telephony systems**, including traditional phone systems and cloud-based VoIP services like **Amazon Connect** and Twilio.
- It includes features like automatic call transcription, sentiment analysis, and intelligent call routing, to provide a personalized and efficient experience for customers.
- Service Cloud Voice can be customized to match a company's branding and voice, and can be programmed to handle a wide range of tasks and inquiries.
- It can be integrated with other Salesforce products, like Service Cloud and Sales Cloud, to provide a seamless customer experience across multiple channels.
- Service Cloud Voice provides real-time visibility into customer interactions, allowing agents to access customer history and insights while they're on a call.
- It includes tools for monitoring and analyzing call metrics, so companies can track the success of their voice deployments and make data-driven improvements.
- Service Cloud Voice is a cloud-based solution, meaning it can be accessed from anywhere with an internet connection.
- It is designed to be easy to use and customize, even for users with little or no technical experience.

Amazon Connect



- Amazon Connect is a cloud-based contact center solution developed by Amazon Web Services (AWS).
- It is a fully self-service, pay-as-you-go solution that allows companies to set up and manage their own contact center without any upfront costs or long-term commitments.
- Amazon Connect is built on the same technology used by Amazon's own customer service centers, providing high-quality voice and chat experiences for customers.
- It is easy to set up and manage, with a user-friendly interface that allows companies to configure routing, queues, and other features without any coding or technical expertise.
- Amazon Connect includes a variety of features to improve customer interactions, including automated call distribution, call recording, and speech analytics.
- It integrates with a variety of other AWS services, including Amazon S3, Amazon DynamoDB, and Amazon Kinesis, to provide a scalable and flexible solution.
- Amazon Connect can be used for both inbound and outbound calls, and can support a variety of channels, including voice, chat, and mobile.
- It provides real-time reporting and analytics, allowing companies to track key metrics like call volume, wait time, and agent performance.
- Amazon Connect is highly secure, with features like encryption, access controls, and regular security audits.
- It is designed to be highly scalable, allowing companies to add or remove agents as needed and to handle large volumes of calls without any performance issues.

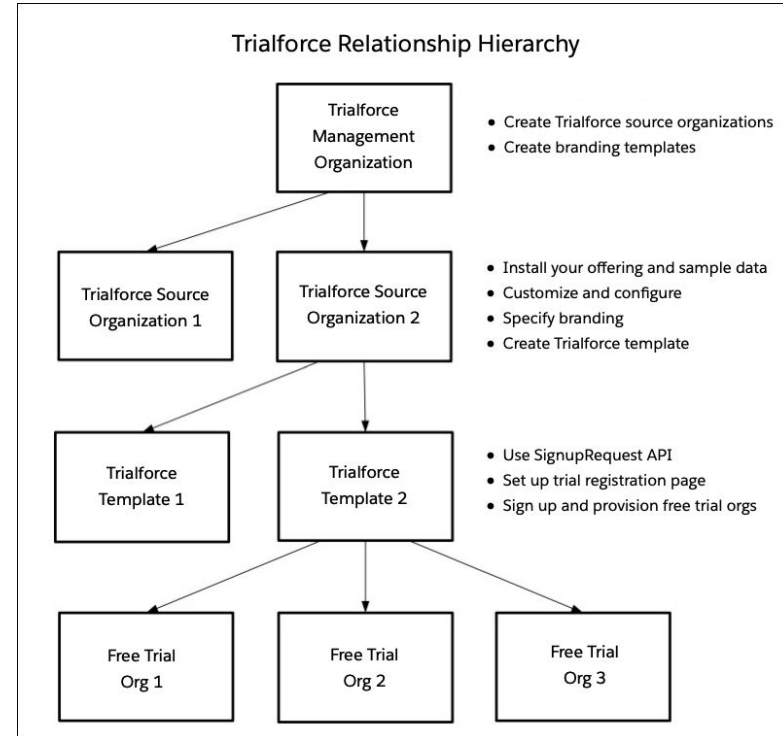
Salesforce - Amazon Connect Integration

- Amazon Connect and Salesforce can be integrated to provide a **seamless customer service** experience across **voice and digital channels**.
- The integration allows customer data and interactions to be automatically **synced between Amazon Connect and Salesforce**, providing a **unified view of the customer**.
- It allows agents to **access customer information and Salesforce data while on a call**, enabling them to provide **personalized and efficient service**.
- The integration can be set up using the **Amazon Connect Computer Telephony Integration (CTI) Adapter for Salesforce**, which provides a simple and easy-to-use interface.
- The integration supports a variety of call features, including **click-to-dial, automatic call logging, and call transfer**.
- It includes features like **call routing based on Salesforce data, real-time call monitoring, and automatic screen pop-ups with customer information**.
- The integration can be customized to match a company's branding and voice, and can be configured to support a variety of use cases, including sales, service, and marketing.
- It provides real-time reporting and analytics, allowing companies to track key metrics like call volume, wait time, and agent performance within the Salesforce environment.
- The Amazon Connect and Salesforce integration is highly secure, with features like encryption, access controls, and regular security audits.
- It is designed to be highly scalable, allowing companies to add or remove agents as needed and to handle large volumes of calls without any performance issues.

Trialforce

Salesforce Trialforce is a tool provided by Salesforce that allows Independent Software Vendors (ISVs) and Salesforce partners to create and manage trial versions of their Salesforce applications. Here are some key points about Salesforce Trialforce:

- Trialforce provides a framework for creating custom trial environments that allow potential customers to test drive a Salesforce application before purchasing it.
- It includes features like self-registration, data seeding, and sandbox creation, allowing companies to easily create and manage multiple trial environments.
- Trialforce also includes tools for custom branding and customization, allowing companies to showcase their application's features and capabilities in a personalized and professional way.
- Trialforce is designed to help companies reduce the time and effort required to create and manage trial environments, allowing them to focus on developing and selling their application.
- It can be used to create both production and developer trial environments, allowing companies to test their application in a variety of settings.
- Trialforce is a cloud-based solution, meaning it can be accessed from anywhere with an internet connection.
- It provides analytics and reporting tools to help companies track the success of their trial environments and make data-driven decisions.
- Trialforce is part of the Salesforce ecosystem, so it inherits the security and compliance features of the platform.
- It is available to Salesforce partners and ISVs who are part of the Salesforce Partner Program.



Salesforce Knowledge



- Salesforce Knowledge is a knowledge management tool that allows companies to create and manage articles, documents, and other content for use by employees, customers, and partners.
- It provides a centralized location for storing and sharing information, making it easier to find answers to common questions and resolve issues quickly.
- Knowledge articles can be organized by topic, category, and language, and can be made accessible to specific groups or individuals based on their roles and permissions.
- Salesforce Knowledge includes features like versioning, approval workflows, and translation management, ensuring that content is accurate and up-to-date.
- It can be integrated with other Salesforce products, like Service Cloud and Sales Cloud, allowing employees to access relevant knowledge articles directly within their workflows.
- Salesforce Knowledge can be customized to match a company's branding and voice, and can be configured to support a variety of use cases, including customer service, training, and marketing.
- It provides analytics and reporting tools to help companies track the success of their knowledge management efforts and make data-driven decisions.
- Salesforce Knowledge is part of the Salesforce ecosystem, so it inherits the security and compliance features of the platform.
- It is a cloud-based solution, meaning it can be accessed from anywhere with an internet connection.
- Salesforce Knowledge is designed to be easy to use and manage, even for users with little or no technical expertise.

Public-Facing Portal

Home Knowledge Base Community Scheduler

Self-Service Portal

As champions of government, our work is guided by our core values. We strive to infuse our values into every action we take, both internally and with the communities we serve.

Contact Us Request Help

Home Knowledge Base Community Scheduler

Schedule an Appointment

Please complete the scheduling wizard below to select an open appointment time slot with a department representative

Welcome to the Department of the Future !

Our site is a place where you can ask questions, seek assistance and collaborate with department staff

Top Online Services



Recent News & Top Blog Posts



Select Work Type Group

What is this service appointment about?

Appointment

Clearance Process

Grants Application

Testing

Vaccination Appointment

Paul PBU Bot

Hello, I'm Paul, your Salesforce Public Sector Bot.

Learn about Salesforce Bots

Search Knowledge

Grants

Local Office Info

Appointments

Type your message...

