Reimagining Customer Experience with Salesforce

Executive Summary

Across Australia and New Zealand, Retail, BFSI, and Healthcare sectors face escalating expectations for seamless, personalised, and digital-first customer experiences. Yet, many organisations remain constrained by fragmented systems, siloed data, and legacy operating models. Salesforce presents an opportunity not just to enhance customer touchpoints, but to re-architect the entire customer engagement model. This paper outlines a strategic perspective on how leading firms are using Salesforce to transform CX and gain sustainable competitive advantage.

Industry Headwinds

Each sector confronts structural and operational challenges that hinder the delivery of modern customer experiences:

Retail

- Omnichannel execution gaps undermine loyalty.
- Static promotions fail to drive meaningful engagement.
- Customer and inventory data remains disconnected.

BFSI

- Legacy infrastructure delays onboarding and service.
- Data silos prevent holistic customer understanding.
- Regulatory compliance constrains personalisation.

Healthcare

- Fragmented patient records impede coordinated care.
- Manual workflows slow down service delivery.
- Demand for virtual-first care is outpacing readiness.

A Platform Strategy: Salesforce as CX Infrastructure

Salesforce offers a cloud-native platform to harmonise front-office operations, surface AI-driven insights, and automate engagement workflows at scale. In a CX-led strategy, Salesforce acts not as a standalone CRM, but as the integration and intelligence layer connecting customers, products, and people.

Sector-Specific Impact

Retail:
- Personalised engagement via Commerce Cloud and Marketing Cloud.
- Real-time promotions linked to customer behaviour and inventory.
- Unified profiles and loyalty frameworks improve LTV.

BFSI:
- Financial Services Cloud streamlines onboarding and KYC.
- Einstein AI surfaces cross-sell opportunities in context.
- Embedded compliance for auditability and risk controls.

Healthcare:
- Health Cloud creates a patient-centric experience model.
- Automated case management enhances care coordination.
- Secure data sharing aligned with privacy mandates.

The Imperative for CX Reimagination in ANZ

- McKinsey finds CX leaders grow revenue 2x faster and reduce service costs by 20%.
- Gartner reports 81% of ANZ consumers switch brands after poor experiences.
- ANZ's digital-savvy customer base demands platform-led, personalised, and timely interaction across sectors.

What Leading Organisations Do Differently

Winning firms recognise that customer experience is not a channel or function—it is the operating model. Salesforce provides the connective tissue across sales, service, marketing, and data. Those who act now can leapfrog their peers by embedding agility, intelligence, and customer-centricity into the core of their business architecture.

To learn more or initiate your CX transformation journey, reach out to DuxXel at info@duxxel.com