



A High AI-Q[™]
Company



Unified Customer Intelligence Platform with Salesforce Data Cloud

Unifying CRM, ERP, and e-commerce data with Salesforce Data Cloud to enable autonomous AI support and personalized marketing.

Executive Snapshot

50%

Routine inquiries resolved autonomously - without queue, wait, or human touch

70%

Support capacity redeployed from routine cases to complex, high-value work

15%

Lift in upsell conversion from targeted journeys - measured against pre-unification baseline

360°

Single customer profile across 3 systems - CRM, e-commerce, and ERP, unified in 3 months



Client Profile

A global EdTech platform headquartered in Singapore, empowering entrepreneurs through personalized education, mentoring, and digital learning experiences.

Challenges

As one of the world's most ambitious digital education platforms, the client's platform was scaling rapidly across markets. Yet fragmented customer data across three disconnected systems made it difficult to deliver personalized experiences and efficient customer service.

- **Siloed Data Landscapes:** CRM, e-commerce, and ERP data existed in complete isolation, creating deep visibility gaps that made a single customer view impossible.
- **Inability to Personalize:** Without 360-degree customer profiles, marketing campaigns were generic—missing upsell signals and high-value segments entirely.

- **Overburdened Support Staff:** Representatives spent disproportionate hours on routine inquiries (webinar registrations, basic FAQs) instead of complex, high-value cases.

QBurst Solution: Creating a Unified Customer Intelligence Platform

Our approach wasn't just to bolt systems together. The goal was to architect an intelligent data foundation that would make the client's entire customer operation smarter automatically. Here's how it unfolded, layer by layer.

Step 1 — Data Ingestion & Harmonization

The first move was to tear down the walls. Using MuleSoft's integration platform, we established secure, batch API connectors between Salesforce Data Cloud and both the external e-commerce system and the ERP. Purchasing data, behavioral signals, transactional records—all of it began flowing into a single hub.

Step 2 — Identity Resolution

Raw data is just noise without context. We configured rule-based Identity Resolution inside Data Cloud to stitch together fragmented records from different systems into definitive, unified customer profiles. The same person appearing in CRM, e-commerce logs, and the ERP was now recognized as a single individual with a complete history.

Step 3 — Calculated Insights & Segmentation

With clean, unified profiles in place, the team enabled Calculated Insights—Data Cloud's native analytics engine—to derive rich behavioral metrics and lifetime value scores for every customer. These became the backbone for precise audience segmentation.

Step 4 — Marketing Cloud Engagement Activation

The newly defined segments were activated directly through Salesforce Marketing Cloud Engagement. For the first time, the client's marketing team could build hyper-personalized journeys — reaching the right customer with the right offer at exactly the right point in their lifecycle.

Step 5 — Agentforce Autonomous Service Agent

The final and most transformative layer was the deployment of a Service Agentforce Agent. Grounded directly in the client’s internal knowledge base, this AI-powered agent autonomously resolves routine inquiries in natural language—from webinar registrations to common product questions—while intelligently escalating complex or sensitive cases to human agents.



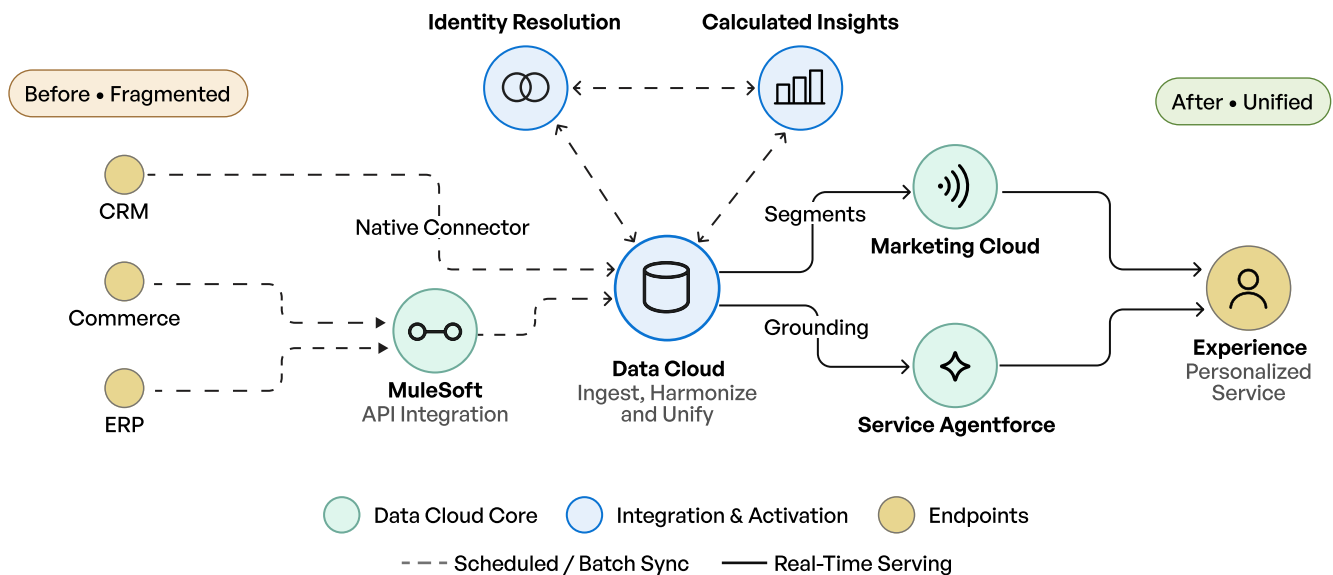
Our marketing team had no way to truly know our customers. We were sending the same messages to everyone, missing opportunities to upsell, and burning out our support staff on questions a machine could answer

Client Leadership Team

Technical Highlights

The solution’s power comes from the interplay of four Salesforce platform layers, each handling a distinct responsibility:

Platform Layer	Role in the Solution
Salesforce Data Cloud (Data 360)	Cross-cloud ingestion, identity resolution, profile unification, calculated insights
MuleSoft	Secure API integration connecting Salesforce CRM, e-commerce platform, and ERP
Salesforce Marketing Cloud	Segment activation and execution of personalized upsell and engagement journeys
Service Agentforce Agent	Autonomous natural language support, routine query resolution, intelligent case routing



System Architecture

Impact

- Faster, More Consistent Customer Service:** The Agentforce agent now resolves 50% of routine inquiries — webinar registrations, FAQs, basic account queries — instantly and autonomously, escalating complex or sensitive cases to human agents with full context. Customers experience a faster, more accurate, and more consistent service lifecycle; the business experiences a support function that scales without scaling headcount.
- Marketing That Converts on Verified Data:** With unified 360-degree profiles and lifetime-value scoring, campaigns are no longer guesswork. Precisely targeted upsell journeys — built on behavioral and transactional signals the marketing team could never previously see together — drove a 15% improvement in upsell conversion over the pre-unification baseline.
- Support Teams Freed for High-Value Work:** By automating routine workflows, the client redeployed 40% of support capacity from repetitive queries to the complex cases that genuinely need human judgment — improving both resolution quality and team retention.
- Built on a Governed, Compliant Foundation:** Profile unification was implemented with consent, data residency, and access controls enforced at the platform layer — so a single view of the customer was achieved without creating new compliance exposure across regions.