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# THE FUTURE OF MARKETING 2020



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Salesforce

## Author

*The Context Marketing Revolution (HBR 2020)*

*Marketing Automation for Dummies (Wiley 2013)*



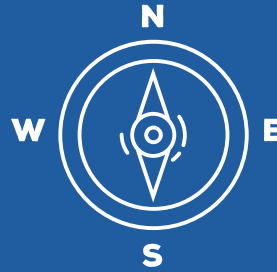




## 5 YEARS OF RESEARCH

- Salesforce publishes reports on the *State of Marketing*, *State of the Connected Customer*, *State of Retail*
- 23,600 global brands surveyed
- 20,000+ global consumers surveyed
- Goal to identify the key traits of high-performing marketing organizations
- Both B2B and B2C brands
- New insights to reveal the key secrets of high performers





# A New Era of Experiences

The Digital Media Revolution was just  
the beginning

# A New World of Consumer Expectations



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King Nasser of Egypt's  
Funeral 1970 –  
**7 Million People**

“Content is King”  
–Bill Gates

6.3 Billion Broadband  
Connections  
**(30X 2007)**

4 Billion  
Connected  
Devices

1.6 Billion DAU of Facebook  
**(100X 2007)**, with 1/3 of  
engagement now on  
Facebook Messenger

50 Billion Connected  
Devices **(12X 2007)**

**COVID-19**

1970

1996

2007

2019

2020

16 Million Daily Active Users of  
Facebook **(3X 1970)**

The world creates 2.5  
Exabytes per day  
**(500X 2007)**

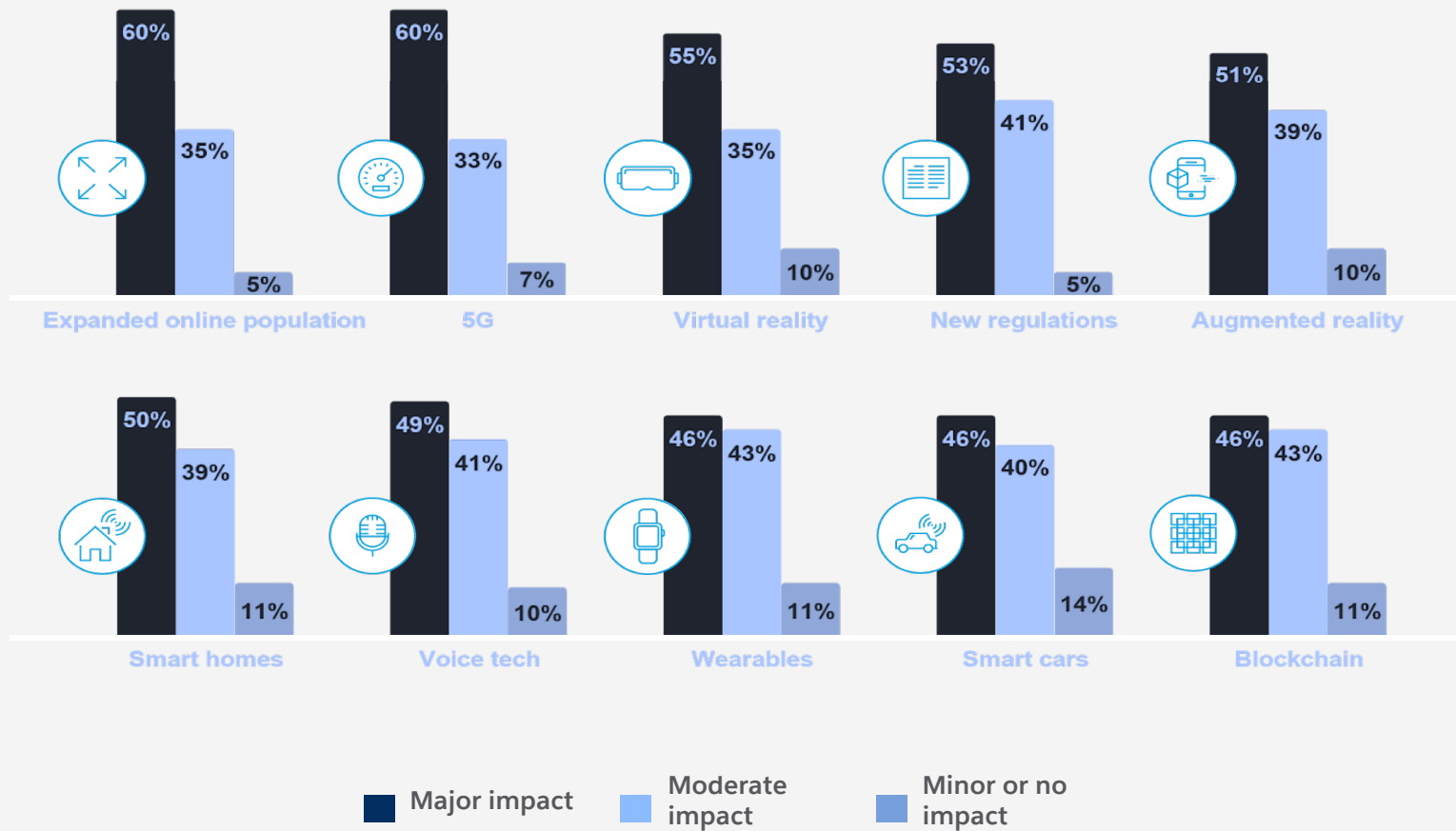
# Not Just Bigger Numbers, It's a New Era



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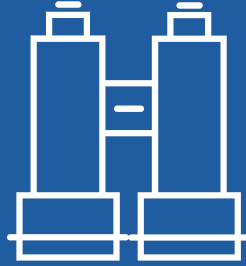


	Analog Era (1970)	Digital Era (2007)	Infinite Era (Present)
SPEED	Hours	Seconds	Real Time
MOBILE CONNECTIONS	0	268M	6380M (30X)
LARGEST HUMAN GATHERING	5 Million (King of Egypt's Funeral)	16 Million DAU Facebook	1.6 Billion DAU Facebook (100x)
DATA CREATED PER DAY	Megabytes	.005 Exabytes <i>per day</i>	2.5 Exabytes <i>per day (500x)</i>
LARGEST CREATOR OF NOISE	Brands	Brands	Consumers/Devices
MEDIA FOUNDATION	Mass	Mass Customization	Personal Context



# Consumers See the Future as Revolutionary

All consumers agree that the expanded online population, 5G, VR, new regulations, and AR are **8X more likely** to have a major impact than a lesser one.



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# Ephemeral Experiences Take Over

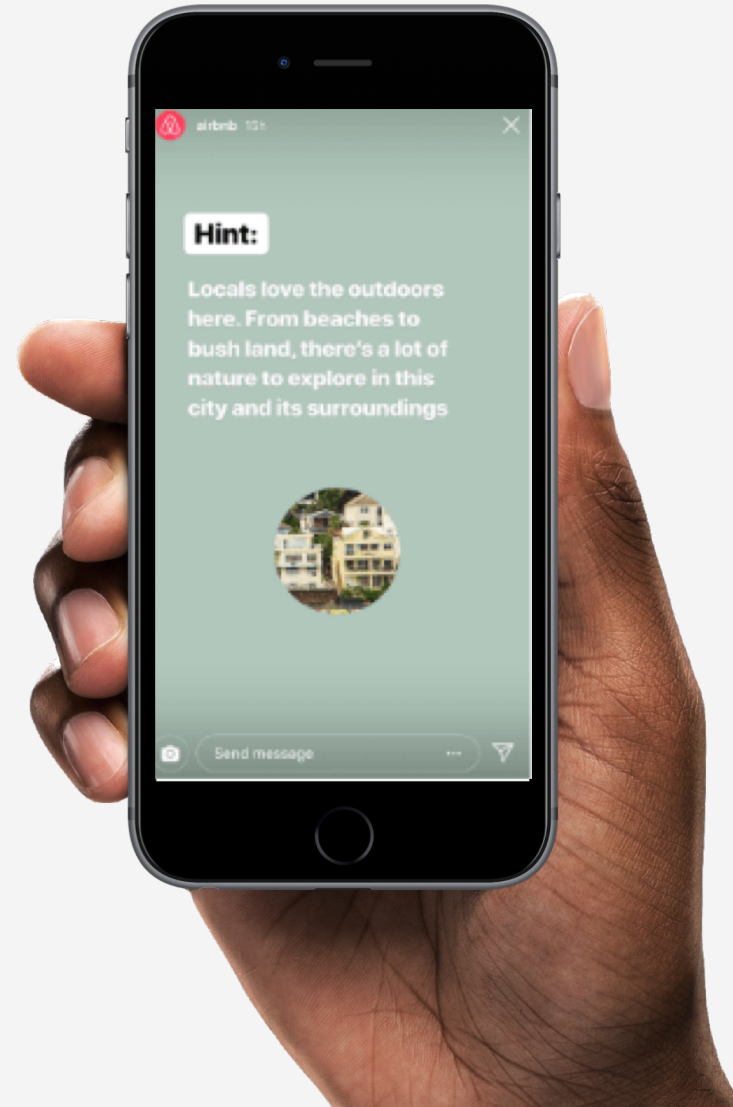
The new era of experiences is just  
beginning to open up

# Ephemeral Content

is a significant slice of future media consumption

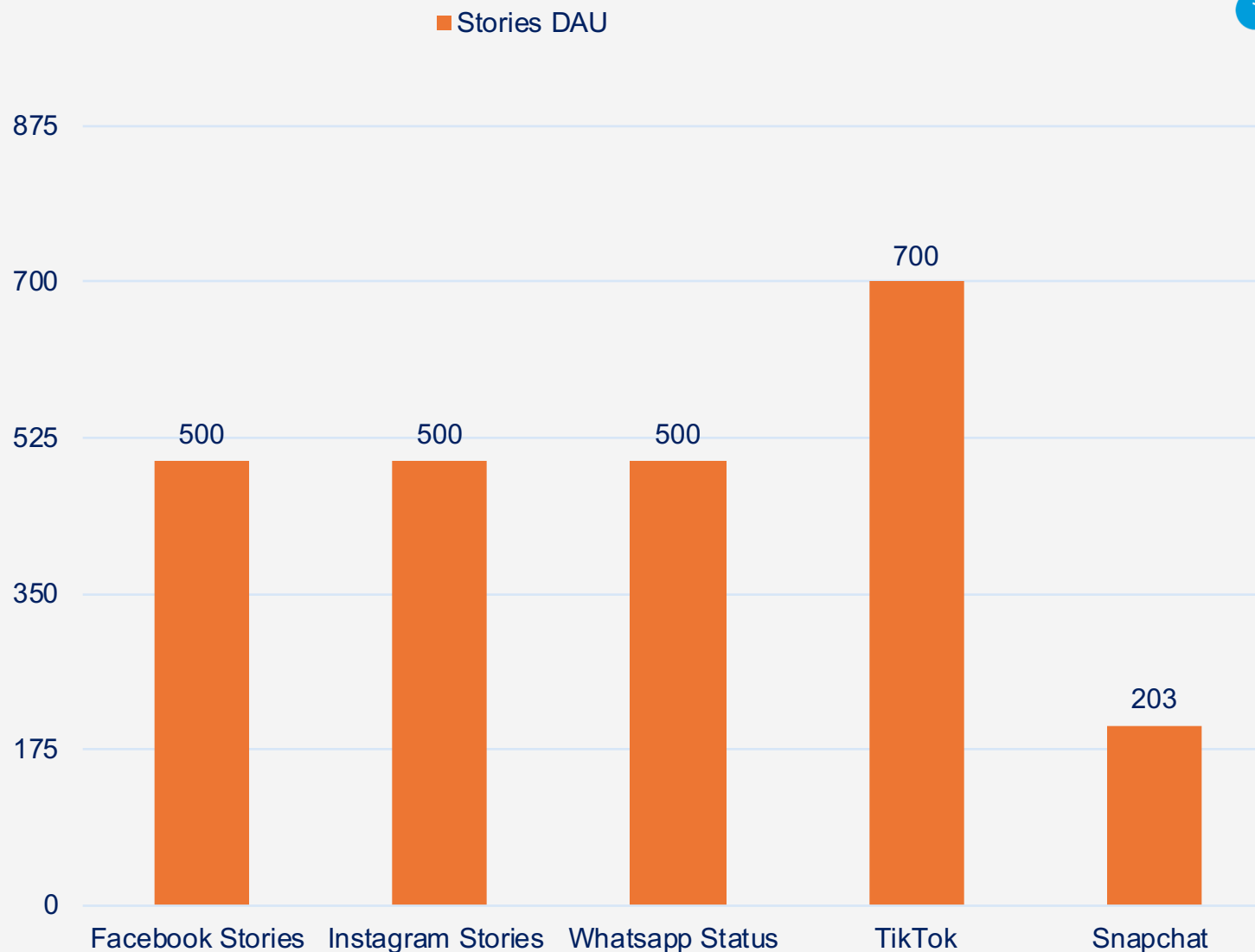
The Stories format is on track to surpass Feeds as the primary way people share things with their friends sometime next year [2020].”

Chris Cox, chief product officer for Facebook, quoted in TechCrunch



# Stories Have Rapid User Growth

Ephemeral stories have seen massive growth from their launch only a few years ago and now account for 1/3 of all Facebook visits. **Put another way, people using Stories on Facebook today is 5X ALL Facebook use in 2007.**





# Brands Embrace Stories

Brands have been testing and seeing the benefits of Stories already. And, with Story ads now possible, Stories has solidified itself as a must-have media format.

# 64%

Of respondents have either implemented Instagram Stories as part of their social media strategy or plan to do so in 2020.

# 1/3

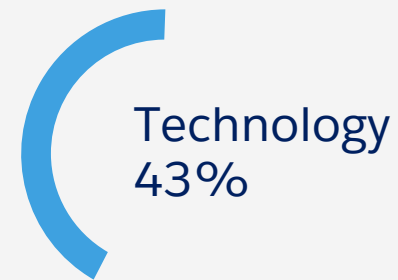
Of the most watched Instagram Stories are from brands.

Instagram self-reported data

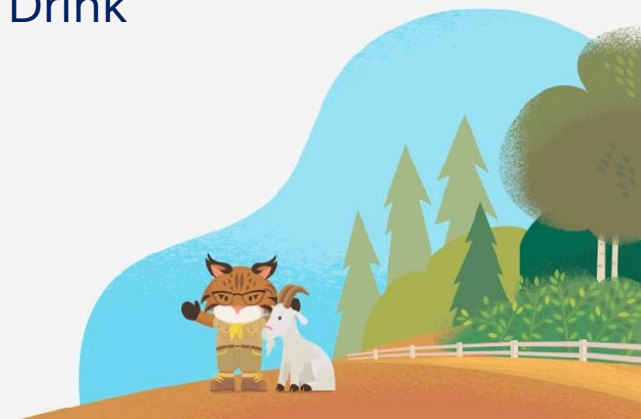


# Use of Stories by Business Vertical

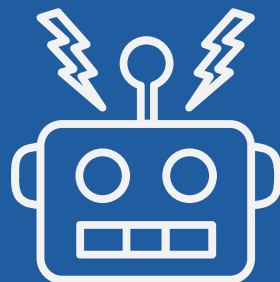
Not all industries have embraced Stories to the same extent, but considering current consumer engagement with the format, that will change quickly.



Benchmarking data from Klear



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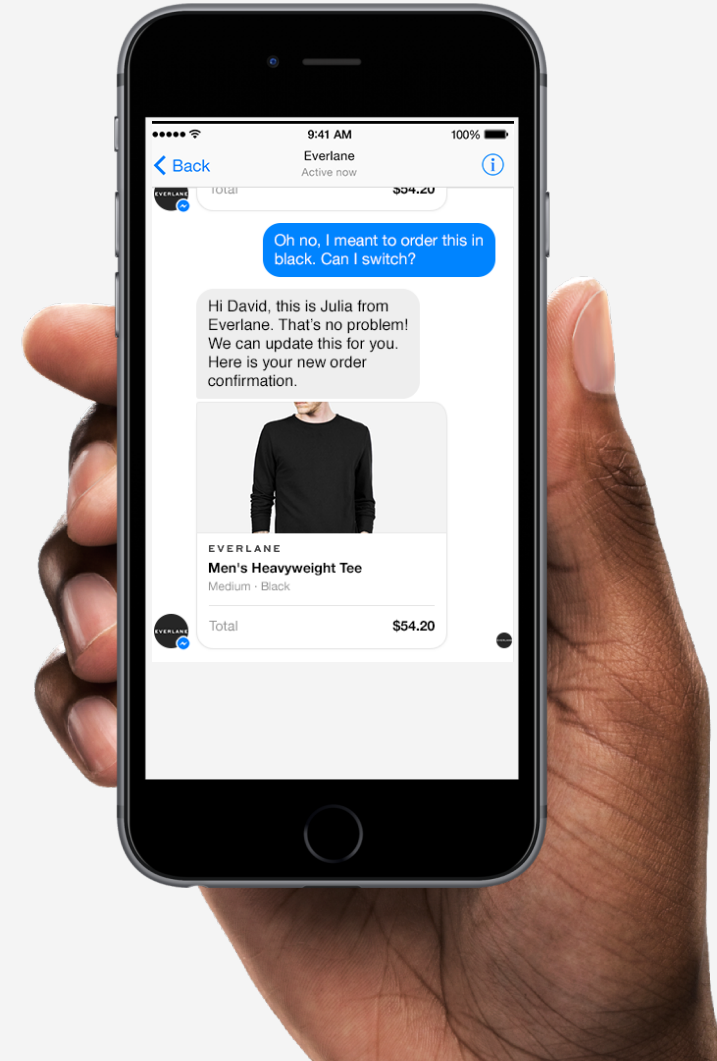
# A New Interface for a New World

Bots begin to take over

# Voice, Messaging & Bots

Welcome to the new future of conversation  
20 billion monthly messages were sent between people and businesses as of 2019, which is **2.5 times more YoY** compared to Q2 2018.

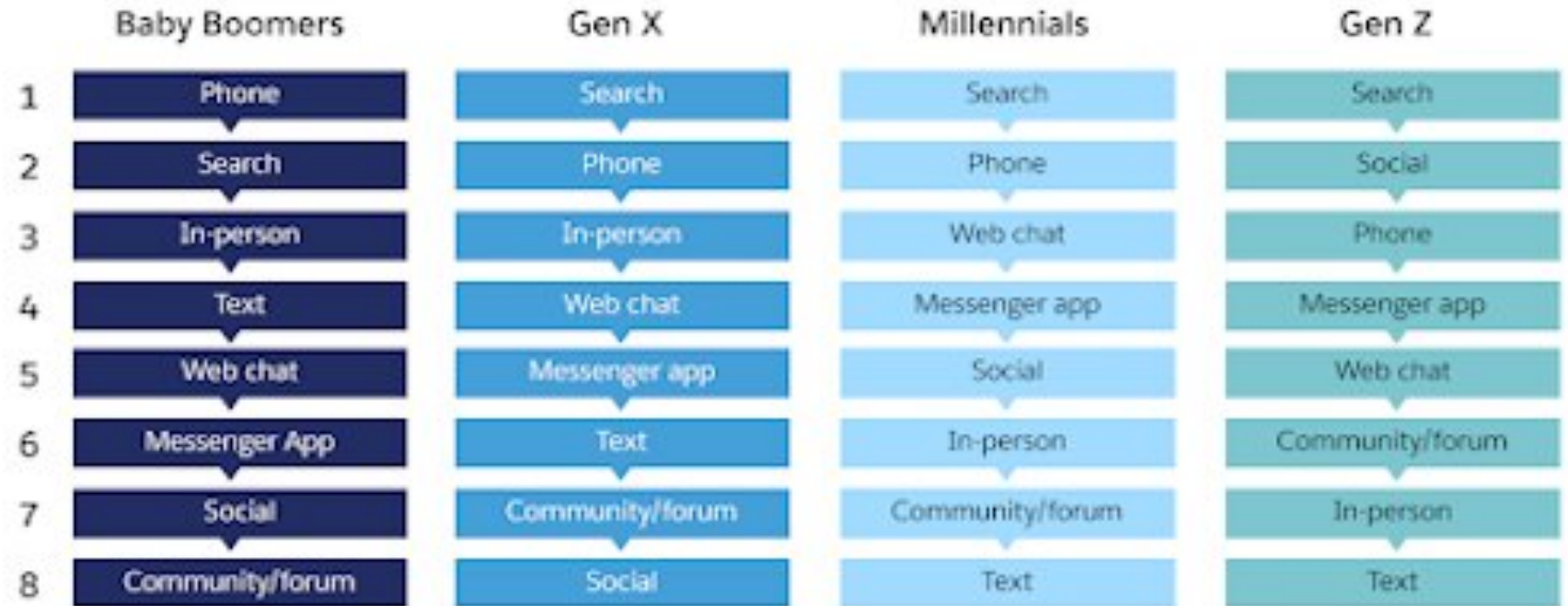
Facebook self-reported data



# Consumers expect to engage with brands via messages and bots

Messages surpassed posts as the number one use of social media in 2015. Now three of the top five social media channels work as messaging networks for brands.

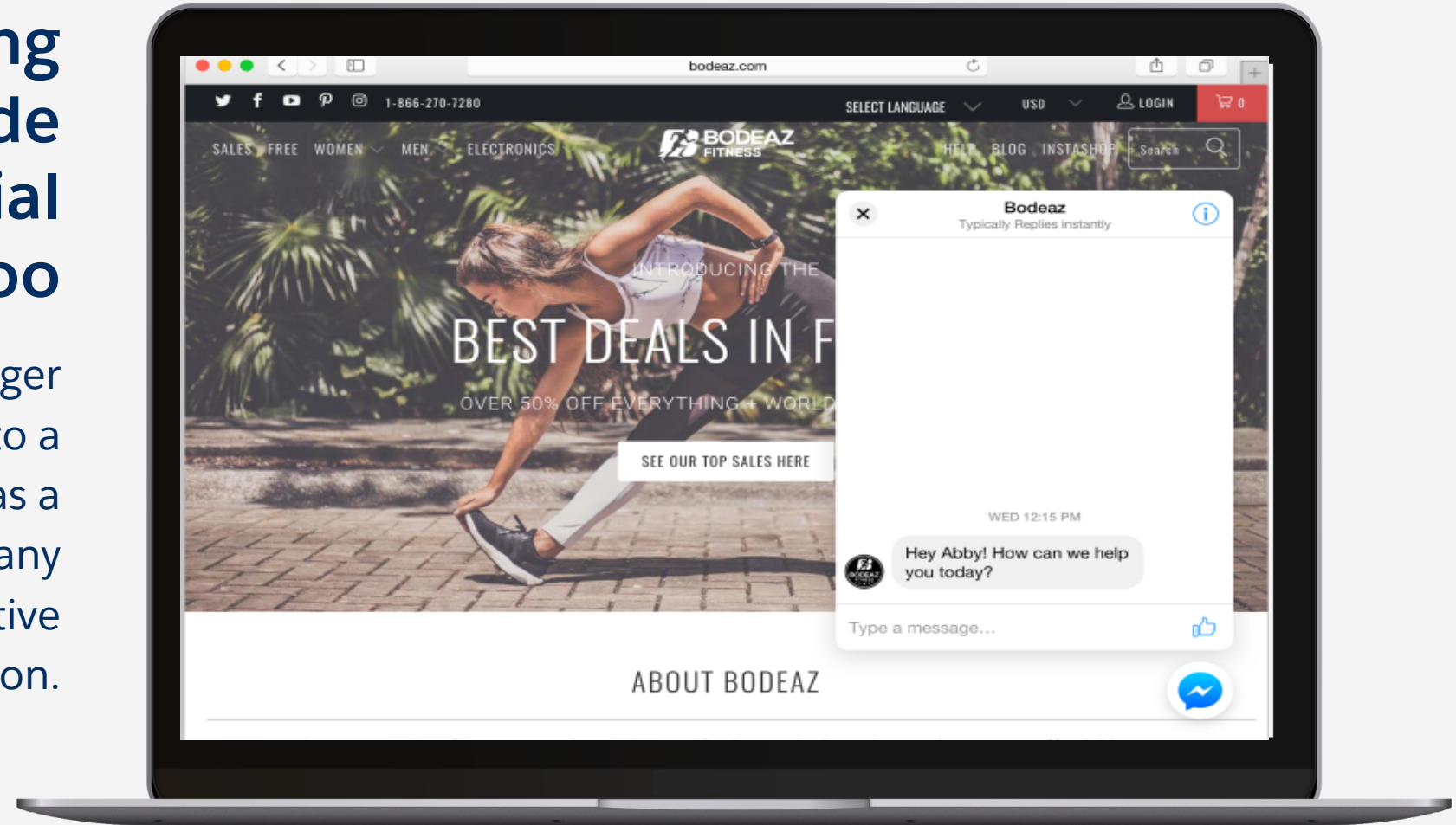
## Order in Which Consumers Consult Sources of Information



Survey of U.S. adults, June 1-2, 2020.

# Messaging happens outside of social networks, too

Facebook Messenger now can be added to a brand's website as a chatbot solution for any business, with native social integration.



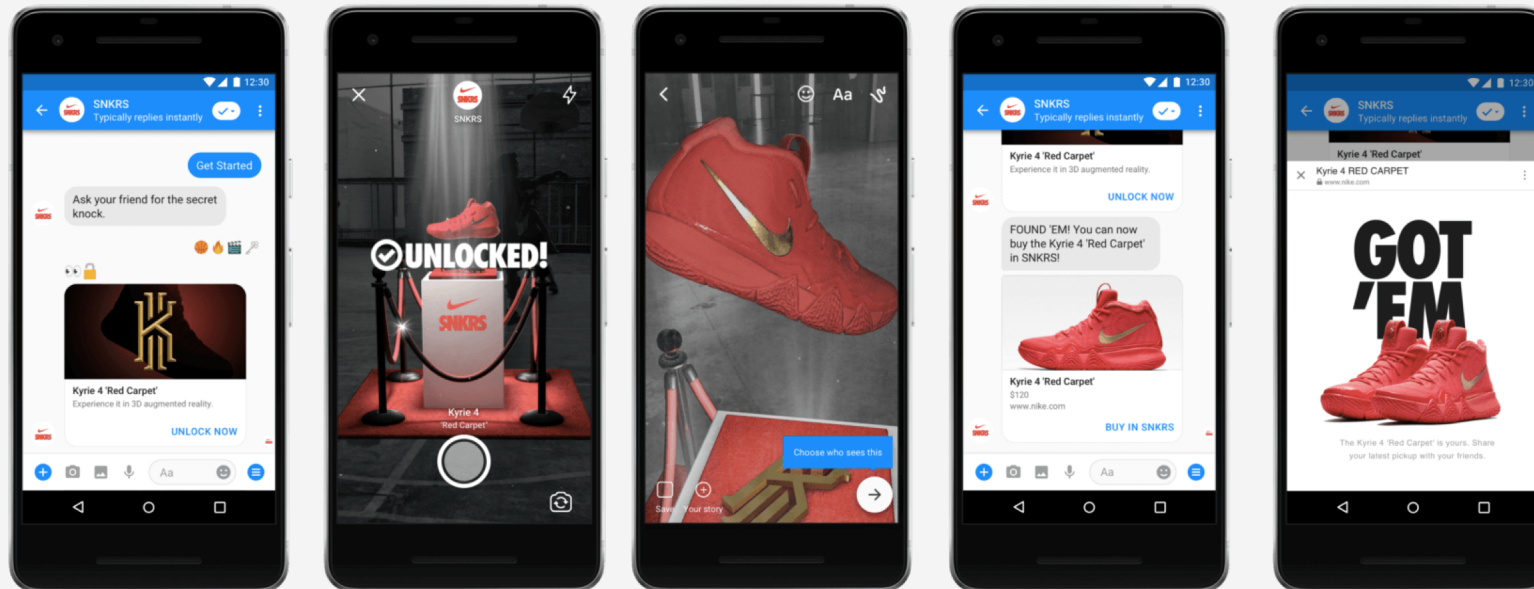


# Bots Lead to Conversational Marketing

**Retail** – Gartner predicts that retail brands implementing visual search by 2021 will increase sales by 30%

**B2B** – Brands using chatbots increase lead flow by 2x

**CPG** – Average order was 2x larger via chatbot



# Bots Across the Customer Journey Will Soon Be the Norm

# 50%

Gartner predicts that by 2021 more than half of enterprises will spend more per annum on bots and chatbot creation than on traditional mobile app development.

Sales  
Bots

Customer  
Onboarding

Content  
Delivery

Support  
Bots

Lead-Generation  
Bots

Internal Business  
Operations





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# The Augmented Buyer's Journey

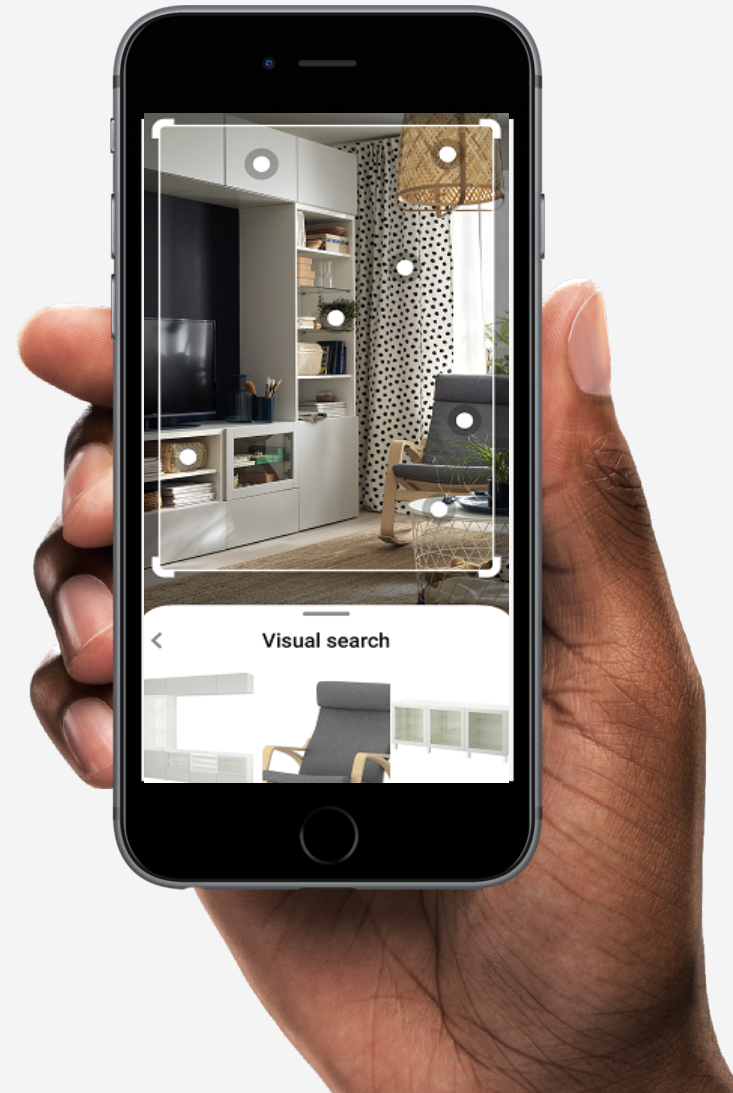
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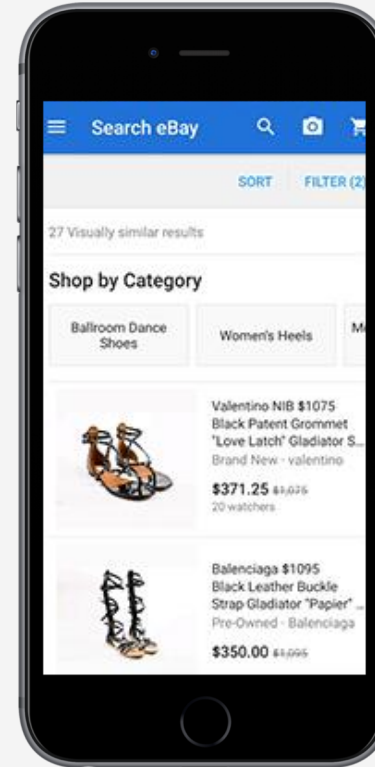
# Mixed Reality (AR, VR, XR)

Welcome to the new future of search and experience

32% of consumers use augmented reality, and 73% of mobile AR users reported either high or very high satisfaction with mobile AR experiences.

Thrive Analytics 2019





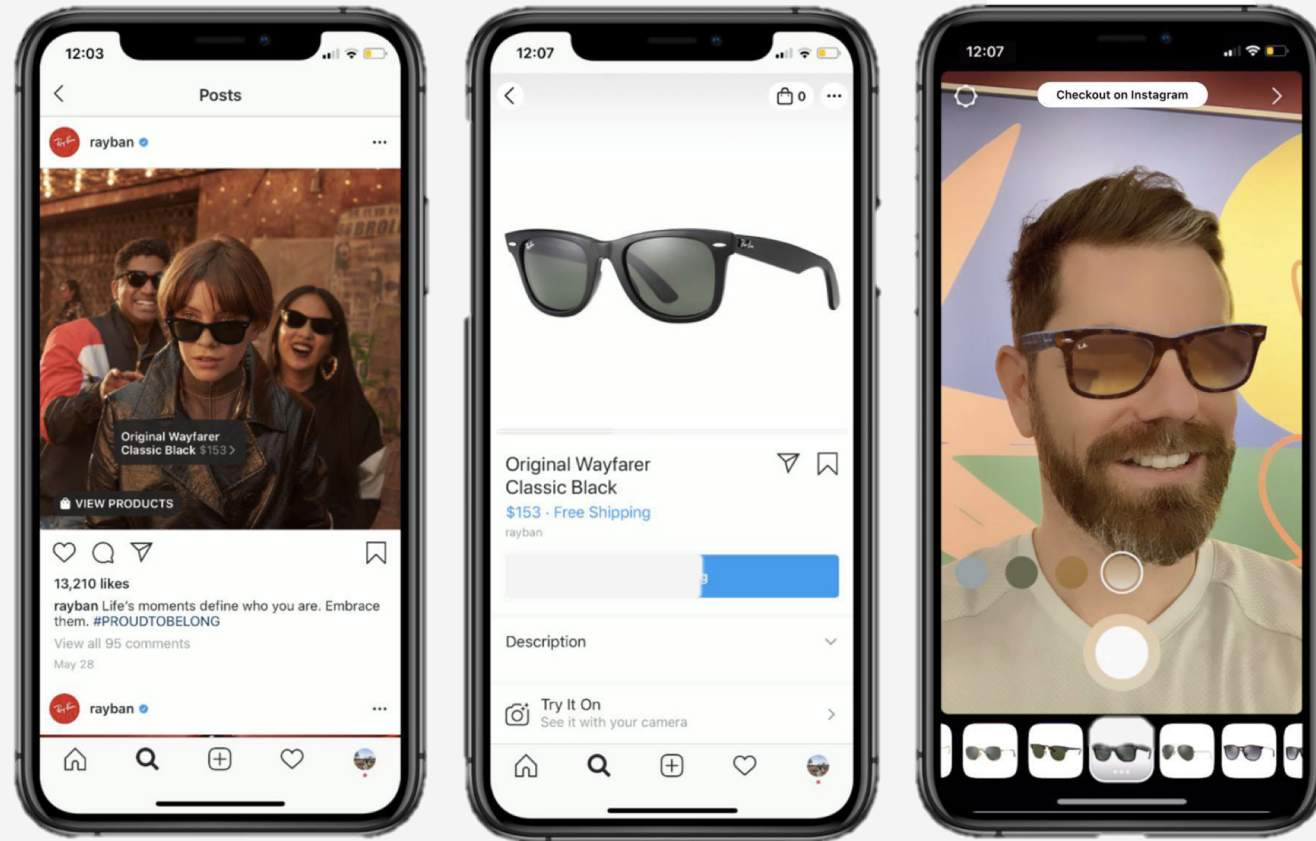
# Visual Search Changes How Consumers Ask Questions

Visual search is radically altering how consumers are triggered to find products. Now any image can be scanned and the product instantly found, creating a new buying habit.



# AI + XR Opens the Door To Full Funnel Experiences

Experiences can now be deployed via social, and when engaged, can open the door to product demonstration, consideration, and even purchase all within the same experience.



# XR Will Affect B2B, Too

With the massive rise of WFH due to COVID, we must employ new ways of engaging customers at a distance. For B2B businesses that sell a physical product, AR opens the door to collaborative demonstrations at a distance.

## Cisco



- AR/VR Digital configuration
- On premise experience without physical product

## AWS



- Tell complex stories in new ways
- AWS's website generated an increase of 180,000 interactions in the first week.



# XR May Be the Future, But Visual Alternatives Are Performing Well Today

62%

Of millennial consumers are comfortable with visual search along their customer journey, but only 32% are comfortable with AR along their journey.

10X

Google Shopping ads saw a budget increase of 33% in 2018, while text ads only saw an increase of 3%.

Merkel 2018

3X

Pinterest visual ads' average conversion rate is 8.5%, three times the average conversion rate of Google Ads.

Merkel 2018

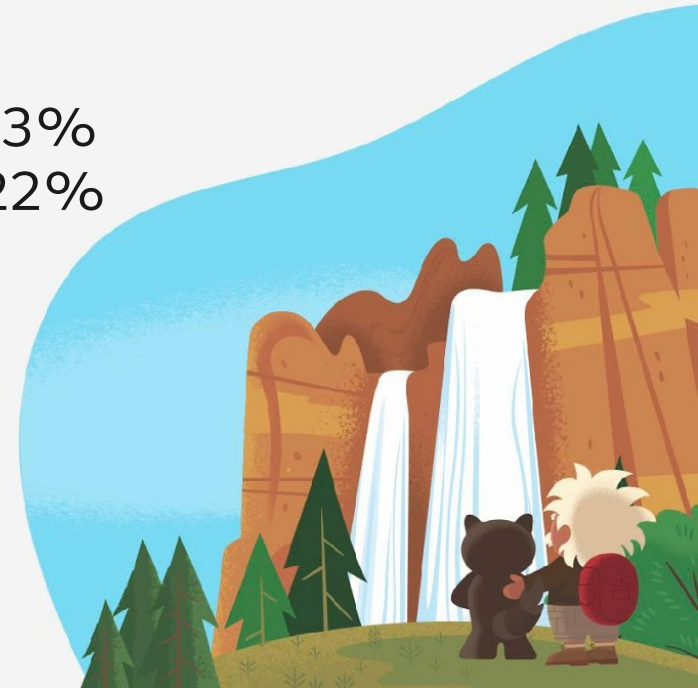


## A Quarter of Small Businesses Say Visual Content Is Most Effective

The types of content small businesses plan to invest in this year include:

- Visuals – 55%
- Videos – 42%
- Articles and blog posts – 33%
- Downloadable content – 22%
- Podcasts – 17%

Source: Search Engine Journal 2019



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# The Changed Consumer

The Revolution has changed your buyer



# COVID Has Set a New Baseline for What All Consumers Expect to Experience



## Online Grocery

20% more groceries were bought online than in-store for the first time in history.



## Ecommerce

eCommerce doubled from 13% to 30%. It wasn't projected to be that high until 2025.



## BOPIS

Retailers with BOPIS sold 73% more than retailers without in-store options.



## Video Calls:

MS Team is at 2.7 billion meeting minutes per day, up from 900 million only two weeks previous.



# The New Normal Consumer



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84% of consumers agree that the experience is just as important as your product or service. They shop in a world of amazing experiences and expect the same from you. What do they expect?

## Digitally Developed

The majority of consumers will now be digital first. They will find products digitally, evaluate them, order, and even embrace new concepts of the digital world, like eSports.

## Brand Fluid

Consumers are price-sensitive and trading down when finding products out of stock. They have put their brand loyalty up for grabs because they have to.



## Cautiously Optimistic

From their concerns about in-store safety to their heightened awareness of personal wellness, consumers are more mindful of their surroundings and actions, while hoping for brighter days. They want recovery but realize it's going to be a while.

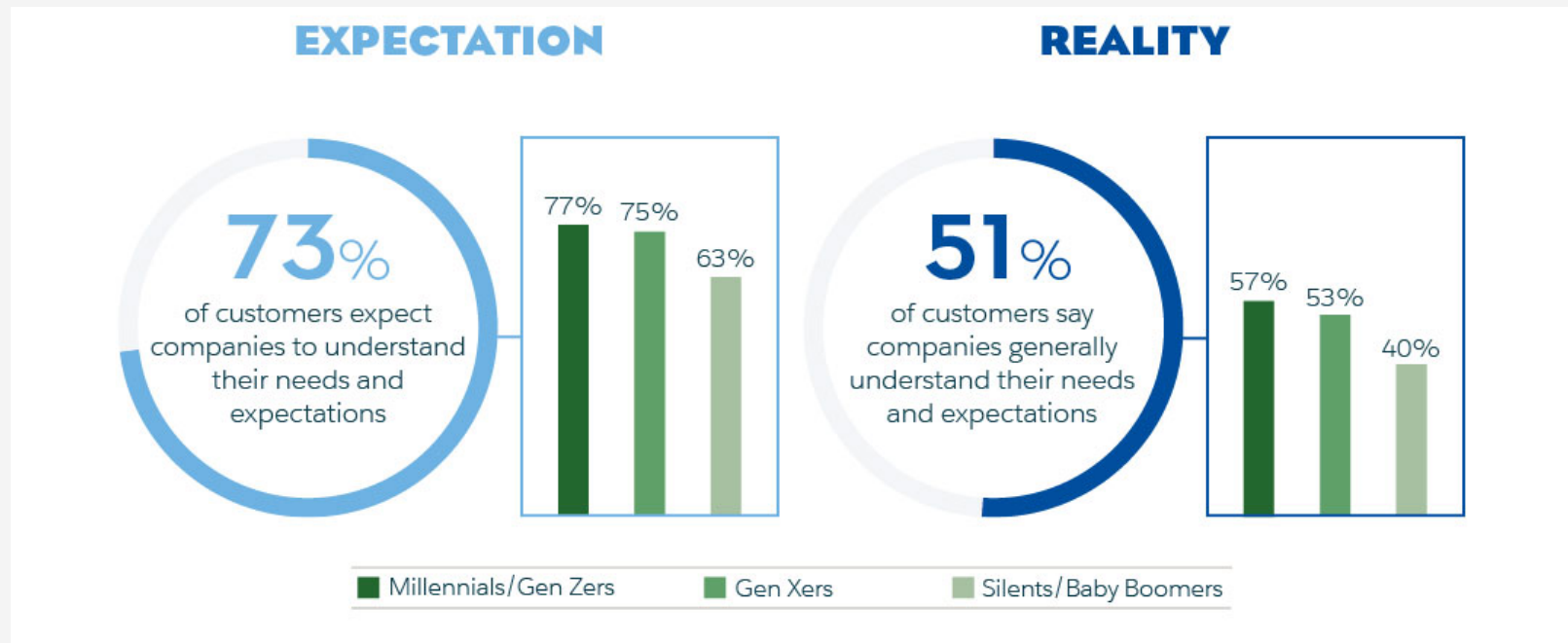
## Comfort-Seeking

Consumers will seek products that provide them comfort, will spend more time at home, and will seek stability in new routines.

# Boomers vs. Millennials: Same Expectations, Different Channels



Boomers have the same expectations but their channels differ. Younger generations (Millennials, Gen Z) expect experiences on new channels like gaming consoles, Twitch, social commerce, etc.





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# Business Buyers' Expectations Are Even More Changed

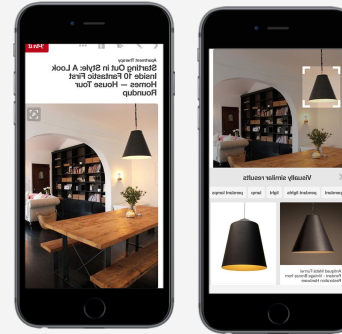
	B2B	B2C
The Experience is just as important as the product or service	89%	79%
Technology has made it easier than ever to take my business elsewhere	82%	70%
Technology is redefining my behavior as a consumer	76%	61%
Technology has significantly changed my expectations of how companies should interact with me	77%	58%
Expect the brands they purchase from to respond and interact with them in real time	80%	64%
Will pay more for a great experience	82%	59%

# The Future Buyer's Journey

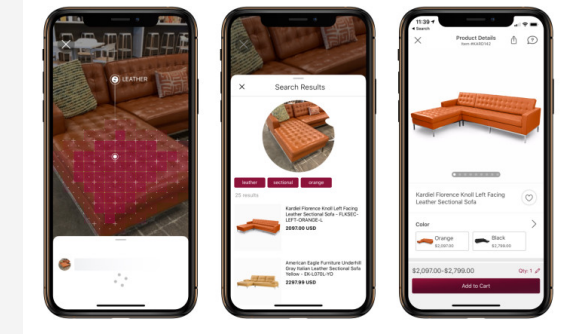
AI alters the buyer's journey by providing new ways of discovery, searching, and purchasing. It compresses the journey to help consumers make more informed decisions faster, **merging brand marketing and the buyer's journey into one.**

- All things are considered purchases
- 1 in 5 purchases now happen on the edge
- 30% of retail will be eCommerce by 2023
- 50% of app development will shift to bot development by 2025

## Discovery



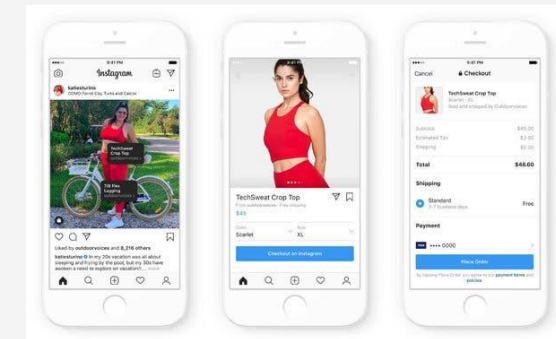
## Comparison

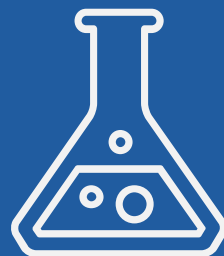


## Evaluation



## Purchasing



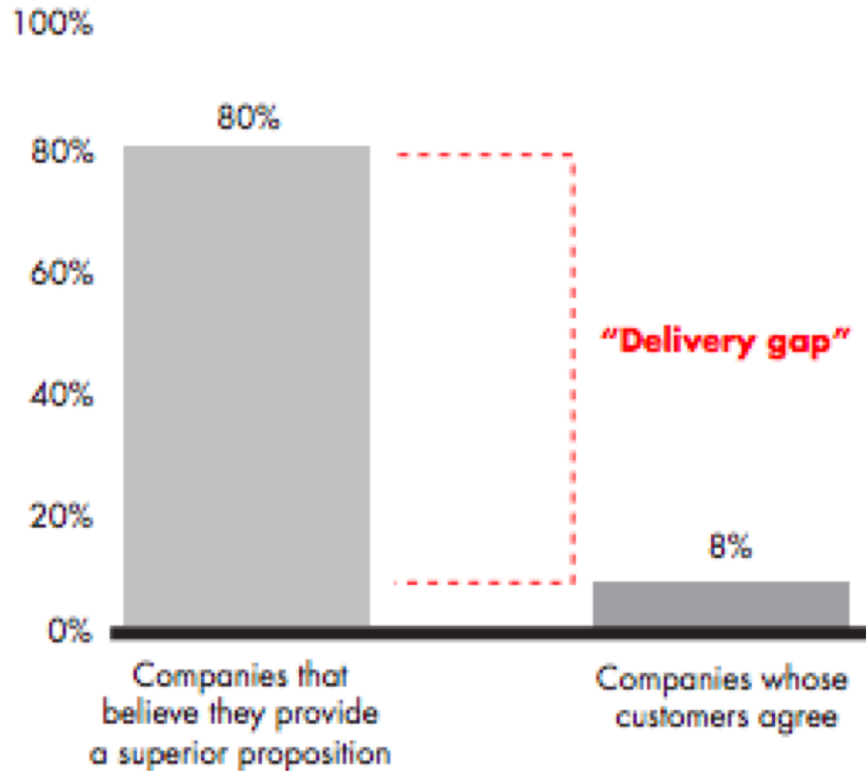


# To Succeed, Marketing Must Transform

In the Infinite Media Era, brands must adapt to the  
environment



Percentage of companies



Source: Bain Customer-led Growth diagnostic questionnaire, n = 362;  
Satmetrix Net Promoter database, n = 375

## Businesses Are Missing the Mark

There is a 72% delta between the experience a business believes it is creating and the experience consumers believe they are getting. That's a massive issue.

We have this issue because brands are simply renovating their existing idea of marketing, putting an “experience” skin on it, rather than evolving to a new idea of marketing.





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# The Marketing Transformation Model

\$4.7 trillion of spending on digital transformation yielded **only 19% of customers reporting significant improvement** in the experiences they encountered with companies. Digital transformation must include marketing transformation, where **marketing takes on a new role, scope, and function**.



## RENOVATE



## EVOLVE



## TRANSCEND

Product-centricity

Role

Customer-centricity

Greater reach

Creative focus

Contextual journey

Siloed department

Operation

Decentralized marketing

Disjointed tools/data

Tech

Streamlined platform

CMO

Leadership

CXO/CGO



# Tesla Transcends the Old Idea of Marketing

It is much easier for new businesses to transcend the old model, as they are starting fresh. Most businesses will not be able to fully transcend in a single step. They must evolve first.



Mercedes-Benz



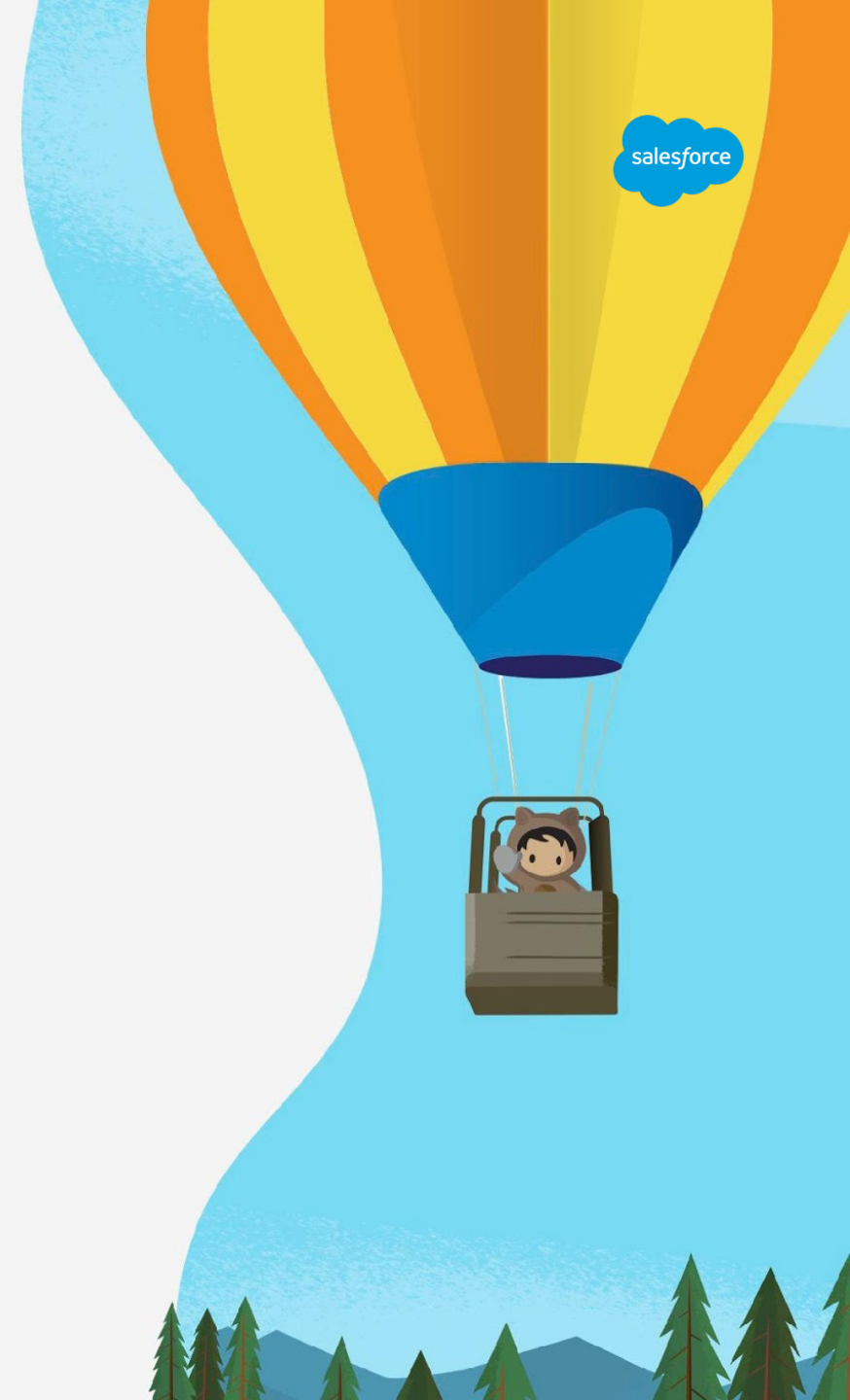
TESLA

Age	94	17
Market Cap	\$49.9B	\$144.20B
Ad Cost Per Car	\$926	\$6
Total Cars Sold	86,000	276,000
Transformation	<b>Renovate</b>	<b>Transcend</b>
Business Model	Build > <b>Market</b> > Sell	<b>Market</b> > Sell > Build > <b>Market</b>

**\*\*Tesla spent 1/150<sup>th</sup> on advertising compared to Mercedes, sold 3X as many cars, had never made an economy car before, and the car didn't even exist when it was sold! Tesla is now the number one luxury car manufacturer.**

# Evolving Requires Four Marketing Transformation Disciplines

1. **Executive Buy-In** to a New Idea of Marketing opens up new roles that operate with a new budget.
2. **Solve Identity Crisis** to open up omnichannel excellence and dynamic experiences.
3. **Evolve to Orchestration** by leveraging the power of new possibilities, not just new tools.
4. **Embrace Context**, the new creative lens of the future.



# High Performers Evolve Foundations First



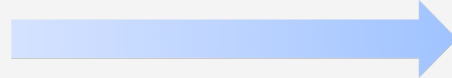
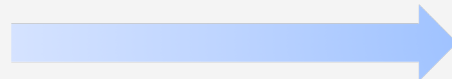
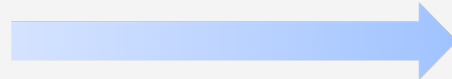
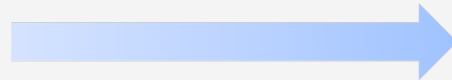
## Renovate

Seek greater efficiencies using current ideas

Marketing remains a siloed department

Marketing must fight for new budget

Focus on creative messaging to reach goals



## Evolve

Embrace new ideas of growth to mirror digital transformation

Marketing evolves to become the orchestrator of all experiences, merging with CX and UX

Marketing is seen as a core business competency and budget reflects that

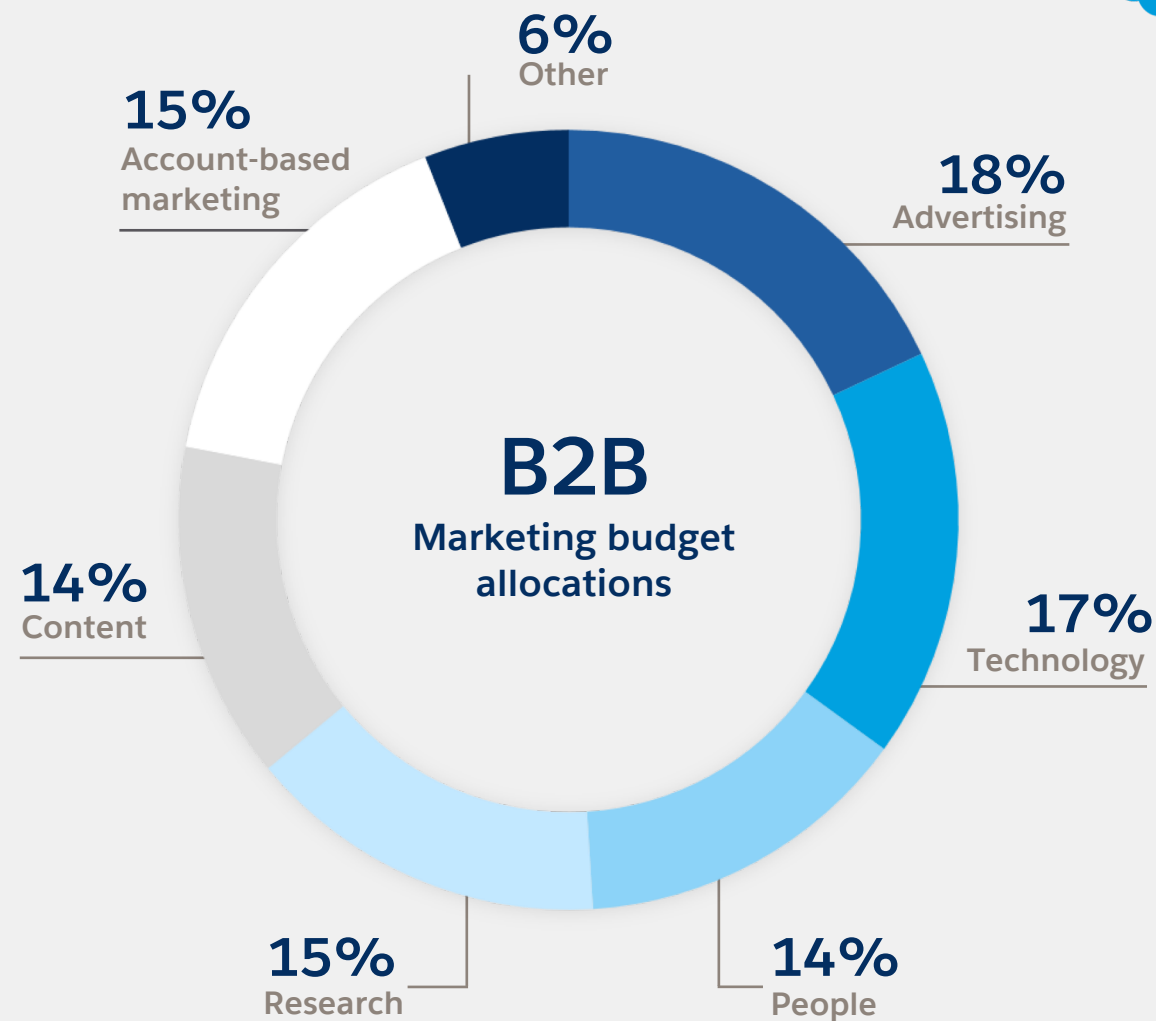
Focus on omnichannel experiences/jobs to be done



# A Larger Marketing Budget Is Required

Greater scope requires a greater budget. Average budgets are currently 7-12% of gross profit; however, those companies looking to grow fast are using budgets as high as 13-30% of projected profits.

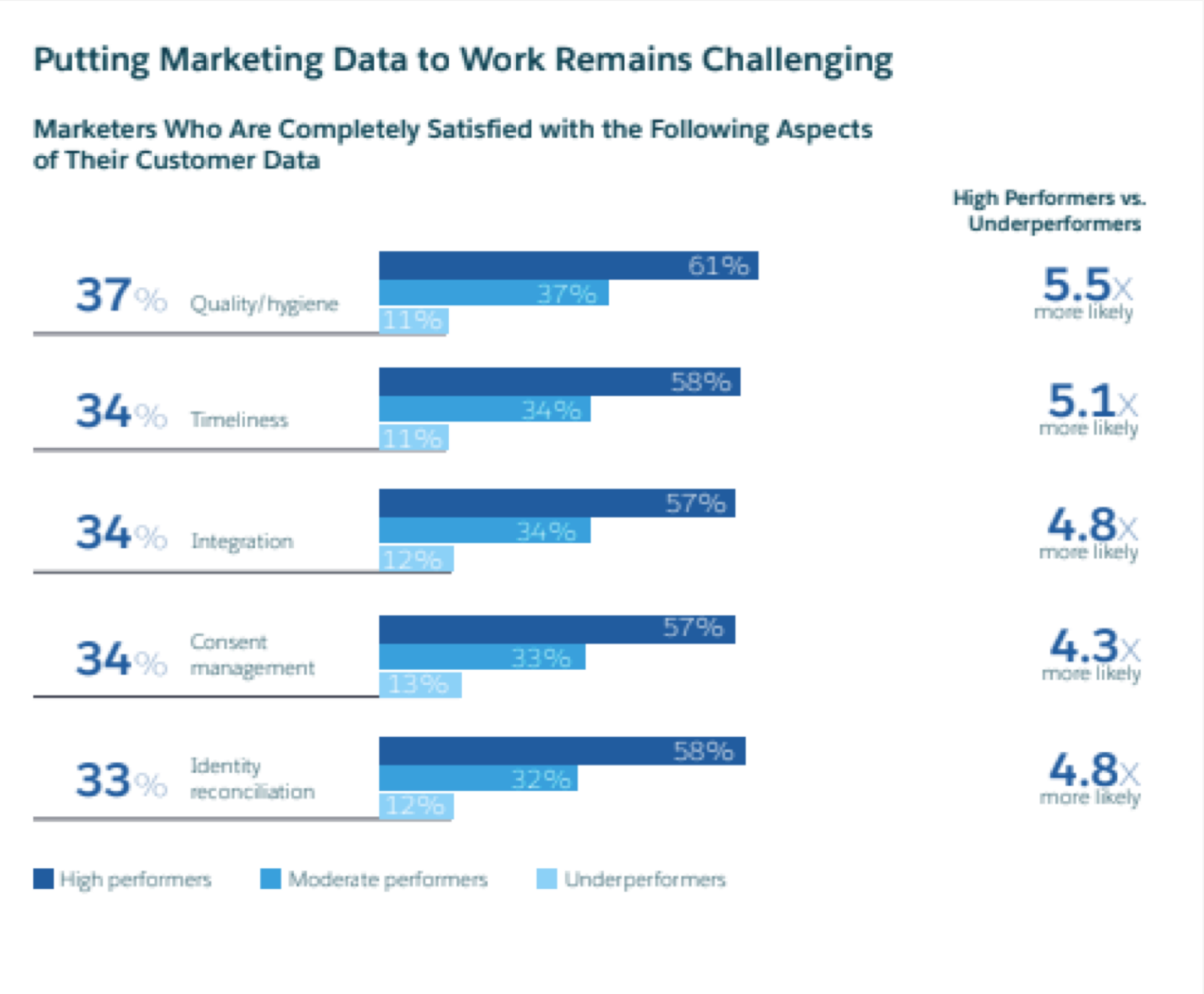
**High performers spend 20% more on technology than under performers.**



# High Performers Solve the Identity Crisis

The average business has 12 data sources and 15 tools in its marketing stack. *That is an issue that needs to be solved.*

1. **Hygiene** – Use of external tools and processes to ensure data that comes in is correct
2. **Timeliness** – Freshness of data
3. **Integration** – Ability to leverage data across the ecosystem of tools
4. **Consent** – Ability to manage profiles and permissions
5. **Identity Reconciliation** – Matching known and unknown data to know who a person is at any moment



# Evolve to Automation, Transend to Orchestration

**Renovate:** Use automation to remove manual tasks from your current work flows.

**Evolve:** Leverage automation to create new programs that were not possible before.

**Transcend:** Orchestrate automations between tools and experiences across your ecosystem and channels.

## High Performers



## Moderate Performers



## Under Performers



Dynamic
  Duplicated
  Siloed

High-performing marketing organizations are 2X more likely to have dynamic campaigns.





# Context Is the Creative Lens to Experiences

Brands aim to craft experiences that meet their customers in key moments. Context is the creative lens to those key moments, in which consumers can best achieve the value they seek. **The key to context is learning to work *with* your audience—not on them.**

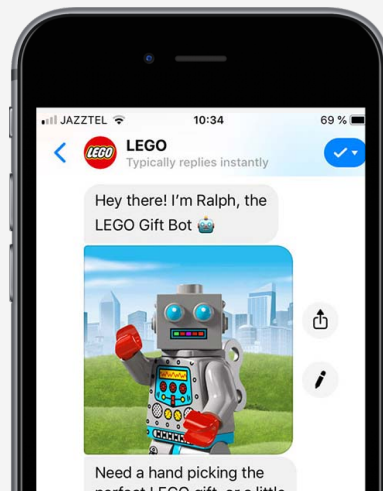
## Awareness

99.5% of the posts featuring DW Watches are created by their customers.



## Consideration

Ralph helped shoppers find the best Lego gift, with an average order size 2X the website's.



## Purchase

IKEA buys TaskRabbit to ease set-up and delivery and made it easier for customers to see how furniture will fit.

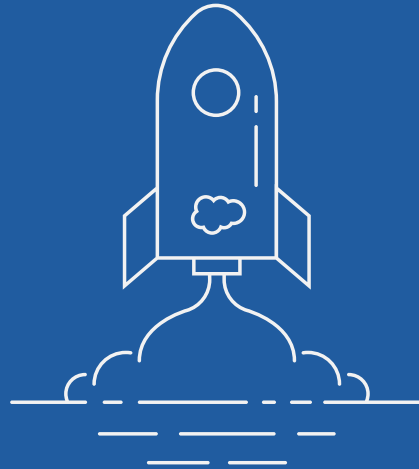


## Advocacy

After joining a community of 1.8 million learners, 1/4 of those have used Trailhead to find a new job.



TRAILHEAD



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# Scale Is the Next Horizon

We have the new idea of marketing, tools, and people. Now we have to scale the execution.

# Three Key Methods Used to Scale Execution

Marketing now has a much greater role—and a new directive. To scale marketing in the Infinite Media Era, we must rely heavily on new technology, bring on new team members to help execute new ideas, and establish new ways of working.

1. Artificial intelligence
2. New marketing team members
3. New ways of working

69% of marketers say  
that traditional marketing  
roles limit customer  
engagement  
— **up from 37% in 2018.**

"State of Marketing, 6th Edition," Salesforce  
Research, April 2020





**1** Personalize individual channel experiences **78%**



**2** Improve customer segmentation/  
look-alike audience modeling **77%**



**3** Automate interactions over  
social channels/messaging apps **76%**



**4** Drive next best actions in real  
time **76%**



**5** Surface insights from data **76%**

## Marketing Becomes #1 Use Case for AI

In 2018 only 29% of marketers were using AI. Now, 84% report using it.

For most brands, marketing will be the number one use case of AI, and these five items outline the biggest effects marketers believe AI will have.

**\*\*High Performers are 2X more likely to have a fully defined AI strategy.**

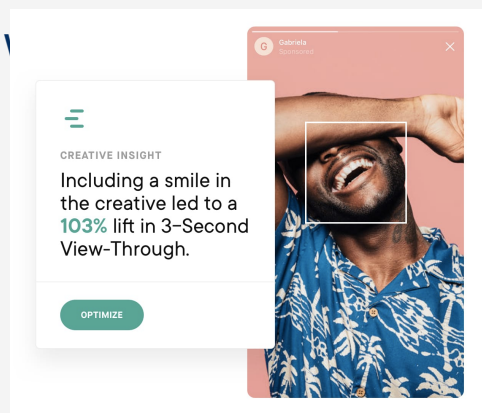


# Marketers Become ‘AI Reliant’ by 2025

AI is currently being used by 80% of all marketers in at least one application. By 2025, we expect all marketers to be using AI in many applications, as it will come standard with all marketing tools. Use of AI will elevate marketers to new heights.

## Creativity

AI will dissect creative so marketers better understand what



## Direction

- Identify new segments
- Create new campaigns
- Direct you to issues

Expect a bot to direct a significant portion of your day by 2025.

## Content

Content will be created in “elements,” which AI will arrange to best match each person. This includes headless commerce, DCO, and AI-driven copy.

## Real-Time Execution

AI will create personal experiences at scale following a Transmedia Story and the Omnichannel Journey.





# ORVIS®



## Orvis Automates Email Personalization at Scale with Artificial Intelligence

- Creates a deeply personalized email experience by serving the most relevant content at open for each customer.
- Optimizes send-time for email outreach to maximize engagement.
- Saves time from setting up manual queries/schedules, building AI-powered emails in minutes instead of hours.
- Increases engagement and traffic to ultimately drive online purchases.

**+5%**  
lift in Open Rate

**+16%**  
lift in Click to  
Open Rate

**+22%**  
lift in Click Rate

**6x**  
decrease in time to  
deploy content



MARKETING



EINSTEIN



# Marketing Recruits New Talent in Order to Scale

Marketing is a radically more complex operation, requiring new expertise that marketing has never had to embrace, and that expertise is coming from other teams.

## Systems Engineers

Many major brands are bringing over systems engineers from the tech side of the house to run marketing technology.

## Agile Experts

Leading marketing orgs are bringing in Agile experts from the technical side of their business.

## Data Scientists

CEOs expect to hire 50% more data scientists over the next three years.

*Citizen* data scientists are growing 5x faster than full-fledged data scientists.

# High Performers Are Bringing Experience Expertise In- House

Research by Jacob Nielsen shows that when good UX design enhances the customer experience, companies see an 83% average increase in KPIs.

**FinServ:** Capital One buys Adaptive Path (CX)

**B2B:** Salesforce buys Sequence (UX)

**Retail:** IKEA buys Task Rabbit (CX)

**Media:** The Atlantic – Faire Design (UX)

**CPG:** McDonald's acquires Dynamic Yield (CX)

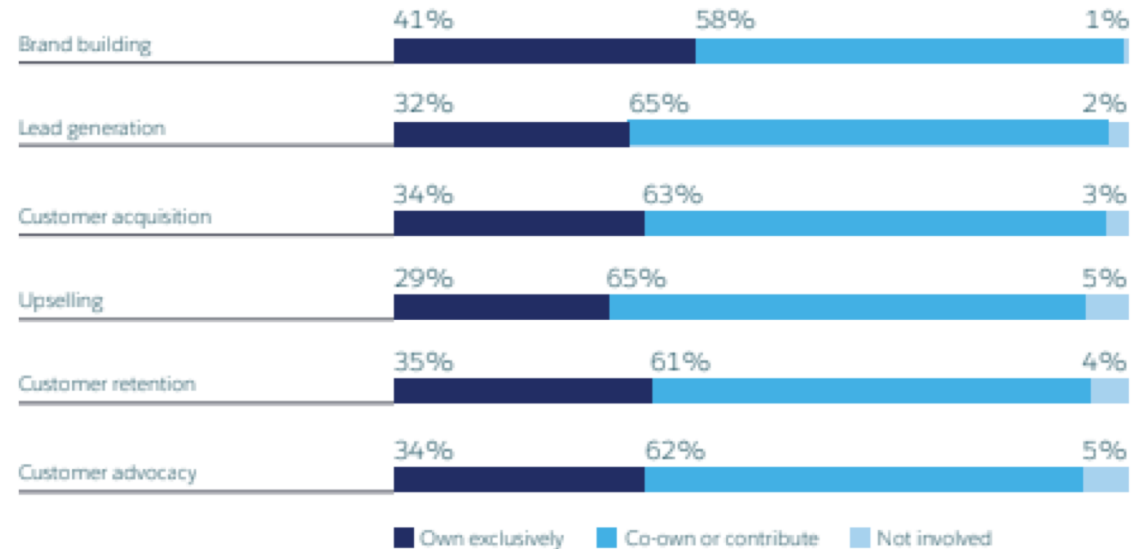


# Empower the Citizen Marketer

As marketing is decentralized across the organization, more employees will have to deliver against the experience mandate, and we will have to empower **Citizen Marketers**



Extent to Which Individual Marketers Are Involved in the Following



**Marketing now supports** SDRs, BRDs, AEs, Product Marketing, Retail Associates, UX, Customer Success, Customer Support, Call Centers, and Customer Advocates—in addition to marketers.

# High Performers Transcend Old Ways of Work Using Agile

High performers are only 33% more likely to be using advanced technology than their under-performing counterparts. The difference in performance is not so much the technology but how they use it.

**HPs are 2.8X more likely to evolve their tactics over the course of a year.**

“We’ve burned the boats. There is no turning back...with Agile **we now produce the highest value of work per unit of time.**”

A quote from one of the world’s largest banks, which has moved its entire marketing department to an Agile structure and work flow.



# Agility Is Key to Future-Proof Marketing



## Lessonly pivots overnight to create a coloring book

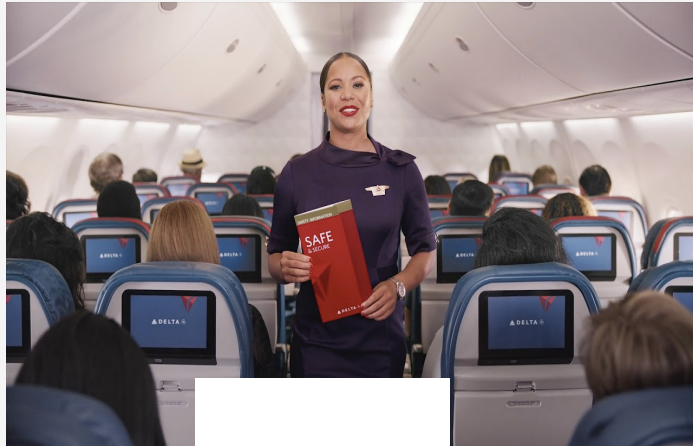
Lessonly scrapped content plans when COVID-19 hit and pivoted to create a coloring book (context marketing), saying “We hope it brightens your day and helps you Do Better Work and, more importantly, live a better life!”



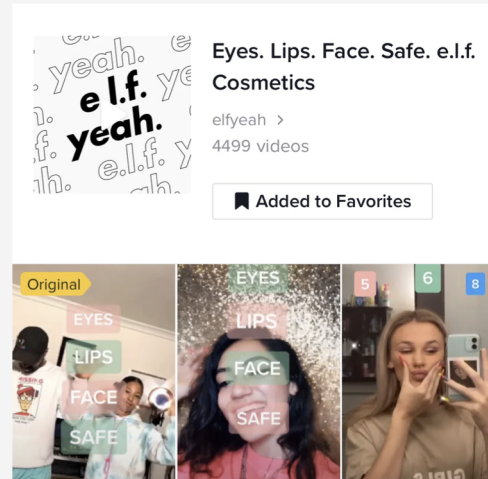
## Salesforce Reimagines World Tour

Our flagship in market event, which would have had 5,000 in physical attendance, was able to pivot in just two weeks to become fully digital and reach 80,000 customers.





Delta releases a new safety video each month so their passengers feel valued. Leveraging modular content, Delta can create multiple pieces of content in a single shoot.



“TikTok is a place where you can’t overthink it. You can’t overproduce, you can’t over strategize, you can’t draw plans six months in advance. It’s so in-the-moment that if you try to apply your Instagram strategy to TikTok, that strategy will be long gone before you even get to the platform.”

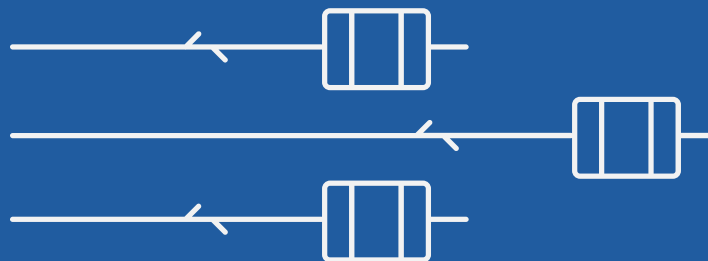
# Creative Pace Accelerates

Consumers see more content than ever before, and they expect brands to keep pace. Brands must evolve their content production to include:

- 1) **Co-created content**
- 2) **Agile method**
- 3) **Modular content**



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# The Anonymous Future

Marketing in a post-cookie world

# Operating in the Post-Cookie Future

Google is the last browser to kill off third-party cookies, and this is going to have a major effect on key marketing roles. Businesses must evolve their methods of data collection, targeting strategies, and reporting methods to survive the change.

1. Trust is cultivated via data management
2. Greater reliance is placed on human-to-human methods

**41% of consumers**  
don't believe  
companies care about  
the security of their  
data



# A New Pathway to Trust: Data

The brands that will succeed are those that understand it is the consumer's data, and the brand is just renting it. Here are three ways to ensure you are building consumers' trust with your use of their data.

76%

of Consumers  
Trust Brands  
That

## Explain

Explain how you plan to use personal data and how you plan to protect it.

89%

of Consumers  
Trust Brands  
That

## Are Transparent

Be transparent about what do with consumer data. You must show that you are creating value with it in ways that the consumer expects.

92%

of Consumers  
Trust Brands  
That

## Honor Ownership

Brands that allow their customers easy access to their data—and the ability to control it—build the deepest consumer trust.

# The Death of the (Third-Party) Cookie

Google plans to kill off third-party cookies within Chrome by 2022!

While others already have cookie blocking, Chrome is the web's most popular browser, representing 64% of the global browser market. Here is what is to come:



- Smart publishers, marketers, and advertisers are already making heroic efforts to build up their **consented first-party data. (#permission)**
- **Industry-wide solutions**—whether through standards bodies or trade associations (second-party)—have the potential to make the customer experience better.
- **Attribution will be significantly altered.** Systems which rely heavily on cookies will become obsolete. Walled gardens will have an edge on their ad platforms.
- Greater reliance on **context**.

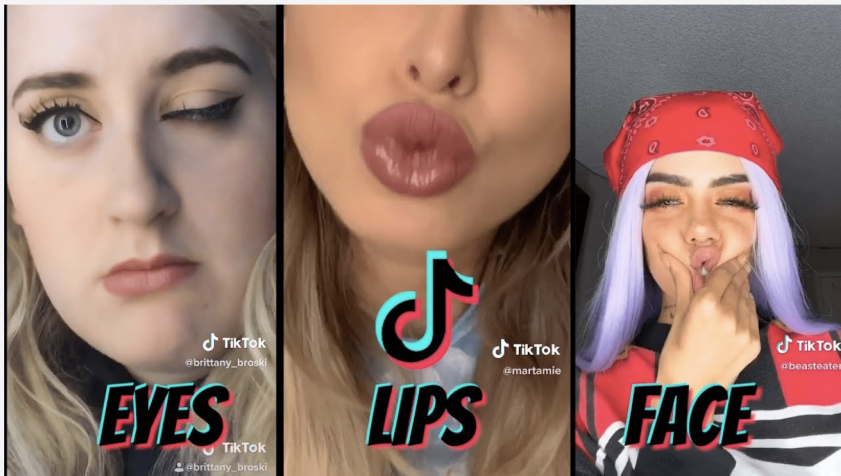
# Greater Reliance on Human-to-Human Efforts

Some of the best-performing marketing channels are human to human. Expect to see marketers putting more emphasis on these networks to help them scale their reach into new markets. **This trend underscores the need for marketing to empower citizen marketers.**



# Human-to-Human Connections Open Doors to New Creative Efforts

Tsingtao recruited more than 40,000 employees and consumers as “Tsingtao social distributors,” who promoted products on their own social networks. The goal was to ask people to buy a case of beer, then the seller was given commission on the sale. Tsingtao’s WeChat store sales subsequently surged by a factor of three.



#eyeslipsface challenge garnered a whopping 5.3 billion views under Marchisotto’s direction. Through creating and leveraging an original music track, “Eyes. Lips. Face.,” the campaign inspired consumers to create their own videos with the song. The campaign saw 3.5 million user-generated videos, 16 million streams outside of TikTok, and it clinched a number four spot on Spotify’s global viral 50 list.





# The UN Co-Creates 13,000 Pieces of Content to Fight COVID-19

The United Nations crafted a co-creation campaign that yielded more than 13,000 pieces of content about the spread of COVID-19, which the UN shared via social channels and on its microsite.

**Goal:** “We want to flood media channels”  
**Tactic:** Co-Creation  
**Platform:** Talenthouse



# CONCLUSION

What it takes for brands to make the  
change to contextual marketing

# We Are in a New Media Environment



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	Analog Era (1970)	Digital Era (2007)	Infinite Era (Present)
SPEED	Hours	Seconds	<b>Real Time</b>
MOBILE CONNECTIONS	0	268M	<b>6380M (30X)</b>
LARGEST HUMAN GATHERING	5 Million (King of Egypt's Funeral)	16 Million DAU Facebook	<b>1.6 Billion DAU Facebook (100x)</b>
DATA CREATED PER DAY	Megabytes	.005 Exabytes <i>per day</i>	<b>2.5 Exabytes per day (500x)</b>
LARGEST CREATOR OF NOISE	Brands	Brands	<b>Consumers/Devices</b>
MEDIA FOUNDATION	Mass	Mass Customization	<b>Personal Context</b>

# The New Normal Consumer



@msweezey

84% of consumers agree that the experience is just as important as your product or service. They shop in a world of amazing experiences and expect the same from you. What do they expect?

## Digitally Developed

The majority of consumers will now be digital first. They will find products digitally, evaluate them, order, and even embrace new concepts of the digital world, like eSports.

## Brand Fluid

Consumers are price sensitive and trading down when finding products out of stock. They have put their brand loyalty up for grabs because they have to.



## Cautiously Optimistic

From their concerns about in-store safety to their heightened awareness of personal wellness, consumers are more mindful of their surroundings and actions, while hoping for brighter days. They want recovery, but realize it's going to be a while.

## Comfort-Seeking

Consumers will seek products that provide them comfort, will spend more time at home, and will seek stability in new routines.



@msweezey

# The Marketing Transformation Model

\$4.7 trillion of spending on digital transformation yielded **only 19% of customers reporting significant improvement** in the experiences they encountered with companies. Digital transformation must include marketing transformation, where **marketing takes on a new role, scope, and function**.



## RENOVATE



## EVOLVE



## TRANSCEND

Product-centricity

Role

Customer-centricity

Greater reach

Creative focus

Contextual journey

Siloed department

Operation

Decentralized marketing

Disjointed tools/data

Tech

Streamlined platform

CMO

Leadership

CXO/CGO

# Three Key Methods Used to Scale Execution

Marketing now has a much greater role—and a new directive. To scale marketing in the Infinite Media Era, we must rely heavily on new technology, bring on new team members to help execute new ideas, and establish new ways of working.

1. Artificial Intelligence
2. New Marketing Team Members
3. New Ways of Working

69% of marketers say  
that traditional marketing  
roles limit customer  
engagement  
— **up from 37% in 2018.**

"State of Marketing, 6th Edition," Salesforce  
Research, April 2020



# Operating in the Post-Cookie Future

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# THANK YOU