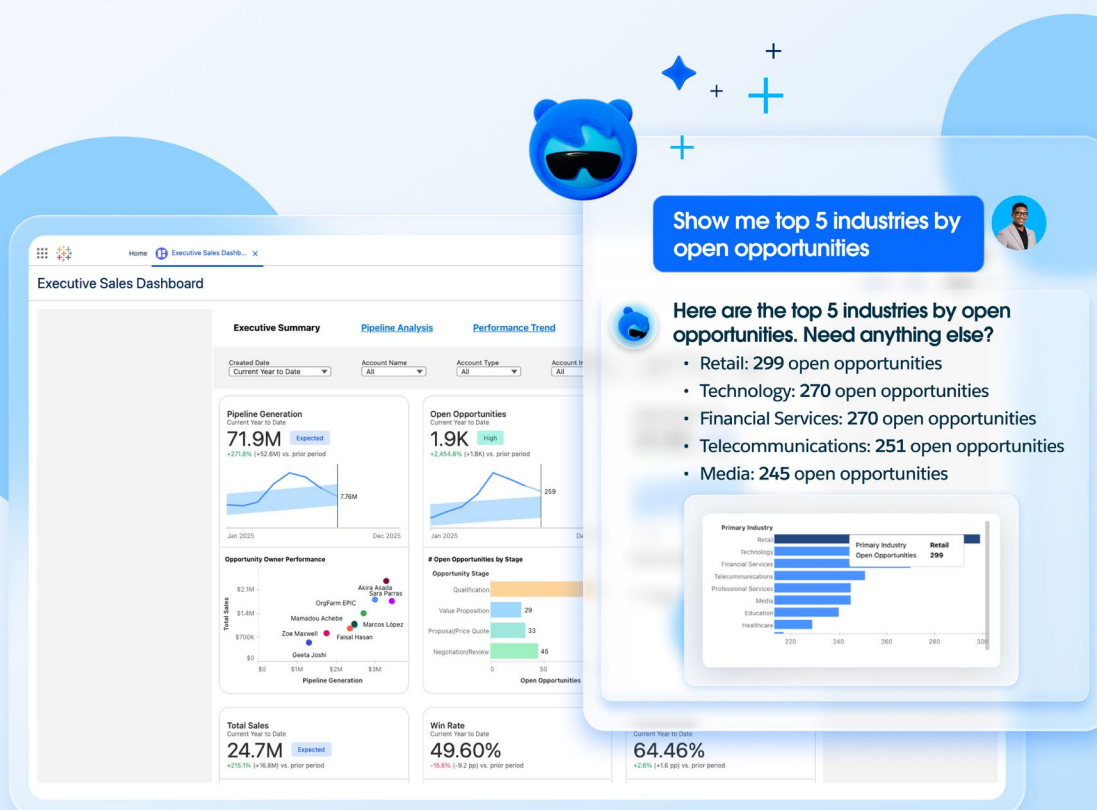# The Data Dilemma Solved: How Leaders Are Revolutionizing CRM with Analytics

4 Ways to accelerate your business from insights to action in the age of agentic AI.

Contents

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from Salesforce

The Data Silo Dilemma

Despite having more data than ever before, many companies remain data-rich but insight-poor. The problem isn't the data, but rather its accessibility. Too often data is siloed, hard to access, outside the flow of work, and untrusted – leaving leaders lacking the insights they need to make fast, informed decisions.

54% **of business leaders aren't confident in their ability to find, analyze, and interpret data.**

The age of agentic AI is here and leaders across industries are excited about its potential to drive growth and create efficiencies. However, for many, that urgency is crashing up against operational realities. AI acceleration is exposing weakness or gaps in data strategy, forcing leaders to modernize their technological infrastructure – specifically their data foundations. Without this investment, organizations will be unable to take full advantage of the benefits AI offers.

Siloed enterprise data isn't just a technical issue, it's a strategic barrier to business performance. When leaders lack real-time, accessible data, they're forced into historical reporting and reactive planning. With a stronger data foundation, they can shift to proactive, insight-driven decisions that fuel growth.

This overall data dilemma results in disconnected systems, inefficient processes, and a lot of manual work. This cannot suffice. As industries and markets get increasingly competitive, success will come to those who can make trusted, data-driven decisions – fast.

70% **of data and analytics leaders believe their company's most valuable insights are in the 19% of the enterprise data that's trapped in unstructured data.**

tableau
from Salesforce

The rise of actionable, AI-driven insights

Good analytics solutions bring data together at scale – with accuracy, trust, and shared understanding – transforming organizations from data chaos to data control.

Reports, dashboards, and visualizations aren't just "nice to have," they're how teams stay on top of key business metrics, understand performance, and operate proactively. When companies can see what's happening – and what's likely to happen – they can work more efficiently and make decisions that actually drive the business forward.

When the right data reaches the right people at the right time, users gain access to personalized, actionable insights directly in their flow of work. And now with the acceleration of AI, particularly agentic AI, the role and value of analytics is shifting. Insights are no longer static snapshots of a moment in time, but dynamic, context-aware, and increasingly capable of guiding (or even initiating) actions on their own.

What is Agentic Analytics?

Agentic analytics is a new category of business intelligence (BI) that uses AI agents to systematically analyze data, proactively share insights, and take autonomous action with limited human intervention. By accelerating every stage of the data-to-insight-action workflow, it enables humans to work collaboratively with AI agents to transform manual, time-consuming processes into efficient, automated, and accurate outcomes. Moving beyond traditional BI, agentic analytics empowers organizations to achieve proactive decision-making and automated action directly within the flow of work.
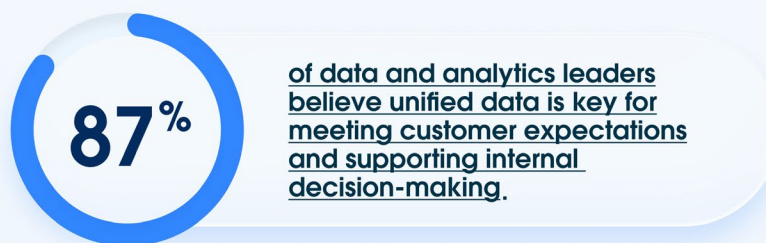
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Unify Your Data and Infuse with Business Context

Unify Your Data and Infuse with Business Context

Eighty-seven percent percent of data and analytics leaders believe unified data is key for meeting customer expectations and supporting internal decision-making. Yet most organizations struggle with siloed systems, lack of data harmonization, and limited access to real-time insights. Analysts spend too much time stitching data together and not enough time interpreting it.

Your analytics and AI are only as good as the data behind them. When data isn't unified, accuracy suffers, interpretations vary across teams, and confidence erodes. Trustworthy insights (and the actions that follow) depend on connected data, enriched with meaningful business context. This is the backbone of agentic analytics, AI-driven workflows, and automation. There are many ways to build a connected data foundation, but deeply unified platforms deliver the greatest value. They enable organizations to move seamlessly from data to insight to action – without having to bounce between tools.

87% of data and analytics leaders believe unified data is key for meeting customer expectations and supporting internal decision-making.

A unified data layer breaks down silos and harmonizes information – regardless of source or format – connecting all the disparate data sources across your organization. This includes data in your internal systems, different Salesforce apps, external applications, third-party systems, and existing data lakes and warehouses.

Zero-copy data federation technology takes this a step further, allowing you to access and query data without physically copying or migrating it – reducing costs and enhancing security. Once data is connected, harmonized, and secure, you can activate it across your applications, workflows, or via AI agents. This transforms your data platform from a passive tool into an intelligent partner that takes action in the flow of work. You can converse and interact with your data, enabling it to reason, respond, and take in-context actions, empowering every team member across your organization.

Tableau Next:

The World's First Agentic Analytics Platform

Tableau Next is a flexible, API-first analytics experience that integrates the #1 analytics platform with Agentforce 360, the world's first digital labor platform. Built on a composable architecture, with a unified data layer and trusted semantics, it delivers personalized, contextual, and actionable insights to every user.

Infuse Data with Business Context

Unified data is a huge step on the path to data maturity, but it's only part of the equation. To make data truly useful, it needs a layer of human and business logic – a way to ensure that your data speaks your business language.

That's where semantic models come in. Semantic models function as a blueprint for your business logic, the semantic layer infuses your data with business knowledge for consistent metrics and trusted insights across every team, and acts as the critical bridge between raw complex data and actionable insights. Enriching data with standardized definitions and deep business context also creates a reliable foundation for decision-making. All of this provides people and AI agents with consistent, high-context insights for a richer, and more helpful agentic analytics experience.

A significant advantage comes when semantic models are already built for you. Instead of spending months manually mapping fields and defining logic, pre-built semantic models allow you to activate your Salesforce data instantly. They organize data to reflect how your business operates – including predefined relationships, calculated fields, metrics, and KPIs optimized for common use cases across fields like sales, service, and marketing. Meaning your data is ready to power AI-driven experiences and analytics from day one.

This matters: 93% of business leaders say insights are only relevant when grounded in business context, and 88% of data and analytics leaders agree that a strong data foundation is essential for successful enterprise AI. Semantic models deliver both. They bring structure, meaning, and consistency to every insight.

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of business leaders say insights are only relevant when grounded in business context.

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Customer 360 Semantic Model:

Purpose-Built for AI

Salesforce's Customer 360 Semantic Model is an example of a purpose-built semantic model. Its unified foundation is built on standardized, cross-cloud definitions, creating a consistent source of truth across your business and giving AI agents the context they need to generate relevant, trustworthy insights. And because they can be extended to reflect unique business processes, teams get timely access to the right data, aligned to how your business actually operates.

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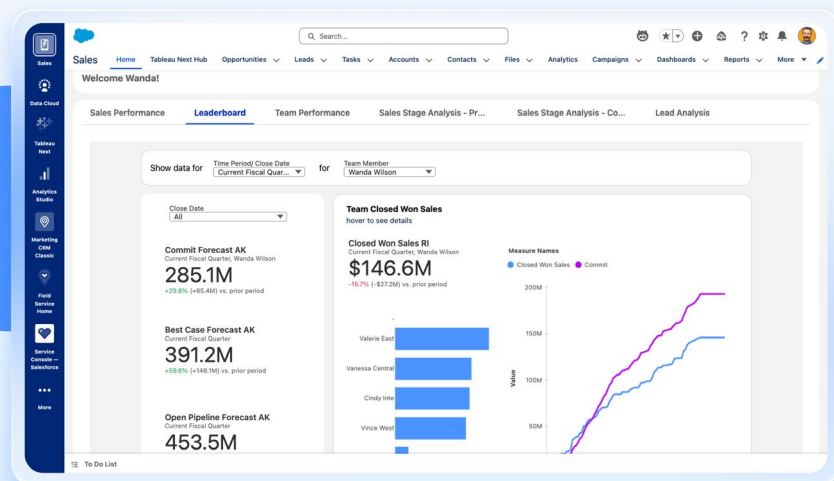# Deploy Out-of-the-Box Analytics for Every Team

Deploy Out-of-the-Box Analytics for Every Team

Organizations often consider building their own analytics solution to meet unique requirements, but building from scratch creates significant hurdles. Even with clean data, custom analytics projects demand extensive time and specialized resources. This often leads to solutions that are slow to deploy and difficult to scale.

Purpose-built, out-of-the-box analytics offer a smarter path forward. By leveraging pre-built semantic models, you ensure consistent insights grounded in business context while getting up and running fast for immediate time-to-value. This approach provides a reliable, governed starting point designed to grow with your business – delivering the impact your business demands today while maintaining the flexibility to customize and expand for your specific needs tomorrow.

Choosing this out-of-the-box approach overcomes the most common blockers teams face by providing:

- ☑ **A fast start with a proven, industry-backed solution.** Metrics, dashboards, visualizations, and semantic models are pre-built and ready to go on day one, accelerating time to value.

- ☑ **Built-in business logic and best practices.** Standard KPIs, proven workflows, predefined relationships, and common metrics are already set up – eliminating guesswork and infighting that often occurs when teams try to build everything themselves.

- ☑ **A single, unified foundation.** A unified data model ensures that every team is calculating metrics the same way. This not only creates consistency, it builds trust.

- ☑ **AI-readiness.** Out-of-the-box analytics solutions are already optimized for AI agents, predictive models, and automated next-best actions. This allows teams to get AI-powered insights more quickly without any heavy data engineering.

- ☑ **Customization as needed.** Out-of-the-box solutions don't preclude customization, they accelerate it. Teams can easily extend dashboards or add custom KPIs and specialized analytics knowing that they're building on top of a trusted, unified foundation.

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from Salesforce

Market Smarter, Sell More Efficiently, and Deliver Next-Level Service

Ultimately, an out-of-the-box approach to analytics eliminates the delays and hiccups associated with building dashboards and metrics from scratch. It also provides teams with immediate access to insights aligned to their specific role or industry. Different teams have different day-to-day activities, but they all share one thing in common: they're overwhelmed by disconnected data and understaffed analytics support. This leaves them without the real-time insights they need to be proactive and productive. Sales teams waste hours digging through dashboards, service teams lack a unified view of customers and operations, and marketing teams struggle to understand performance across channels. Without organized, contextualized data, teams across your organization are relegated to relying on outdated reports or gut instinct.

Modern analytics platforms solve these challenges through purpose-built semantic models, out-of-the-box role or industry-specific apps, and trustworthy AI-driven recommendations. These tools empower teams to garner the insights they need to identify trends, spot risks, and take proactive action. Real-time visibility, guided action, and embedded analytics across every role also enable teams to prioritize the right work, act on the right opportunities, and collaborate seamlessly – ensuring faster time-to-insight and more confident, data-driven decision-making.

Spotlight on Purpose-Built Analytics Apps

Tableau Next powers a portfolio of purpose-built analytics apps designed specifically to help sales, service, and marketing teams extract value from their data immediately. Tableau Next Apps for Salesforce are powered by optimized semantic models that define the right KPIs, relationships, and logic upfront.

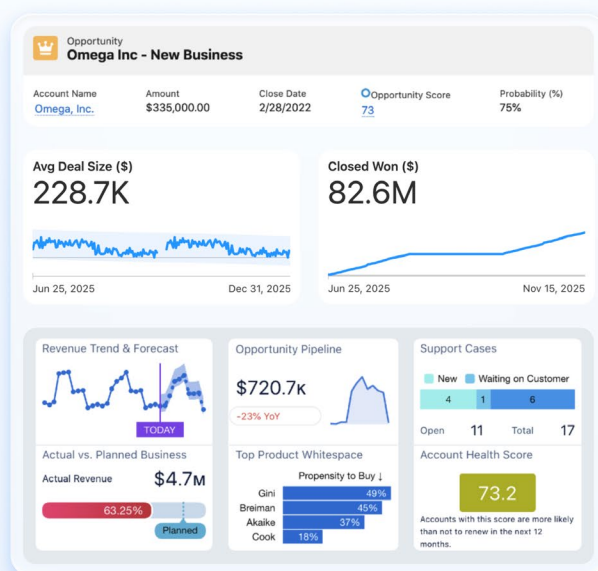|		Business Value	Pre-Built Analytics
Team	**Sales and Revenue**	Grow revenue and improve forecast accuracy with visibility into pipeline health, performance, and deal progress. Sales leaders can coach reps, prioritize high-impact deals, and optimize the product-to-cash lifecycle across pricing, subscriptions, fulfillment, and billing.	**Sales:** Leaderboard, Sales Trends, Team Performance, Team Activities, Lead Analysis, Sales Stage Analysis **Revenue:** Pricing, Subscription Revenue, Order, Billing
	Service and Field Service	Improve customer sentiment, CSAT, and capacity planning with unified service performance data. Leaders resolve issues faster with a single view of cases, agents, and AI, while field service teams allocate resources using operational insights.	**Service:** Cases, Case Satisfaction, Service Agent Analytics, Service Assistant, Omnichannel, Knowledge, Human Agent Performance **Field service:** Field Service Intelligence, Operations Home, Capacity Planning
	Marketing	Attribute marketing ROI with a unified view of cross-channel performance and attribution data	Attribution, Channel Performance, Media Spend, Content Performance, Marketing Performance & Campaigns
	Agents, Data, and Integration	Gain visibility into agent adoption, health, and usage across the organization. Teams monitor consumption-based products, anticipate credit usage, and optimize API performance and response times to support integrated operations.	**Agent:** Agent Analytics and Agent Health Scores **Data:** Consumption Overview and Consumption Explorer **Integration:** API Performance and API Response Times
Industry	**Life Sciences**	Improve patient outcomes and reduce churn by tracking engagement trends and patient-reported outcomes. Care teams can identify where patients need additional support and make informed decisions across the care journey.	Patient Engagement, Payer and Benefits
	Financial Services	Grow client portfolios with a unified customer view. Advisors gain insight into churn risk, growth opportunities, and next-best actions across wealth management and retail banking to support informed decisions and prioritization.	**Wealth Management:** Client Churn Risk, Likelihood to Add Assets. **Retail Banking:** Customers, Activities, Customer Acquisition Dashboard, My Referrals Dashboard, Branch Management, and Branch Unit Related Record Analysis Dashboards
	Manufacturing and Auto	Drive business outcomes by tracking critical KPIs across manufacturing and automotive operations. Leaders monitor business health, sales, and pricing performance to surface insights for faster, more confident decisions.	**Manufacturing:** Account Insights and Health, Product Performance, Pricing and Sales Agreement Insights, Whitespace Analysis **Auto:** Vehicle Portfolio, Warranty Insights, Active Work Orders

3

Deliver Insights in Your Team's Flow of Work

Deliver Actionable Insights in the Flow of Work

You could have the best analytics solution money can buy, but if those insights never make it to your teams and associates, it doesn't matter. If you can't surface insights in a way that aligns with how people work, crucial insights will be missed. Conversely, an AI-powered analytics solution with the ability to embed agentic analytics into your workflow turns raw data into actionable insights exactly where and when decisions are made. This replaces manual reporting, hunting down data, and reactive planning with contextual, role-specific insights and information that gives organizations better data, more accurate actions, and consistent, trusted information.

Teams waste tons of time swivel-chairing and hunting down data. With embedded analytics, the data comes to you. Imagine being able to share live metrics, explore dashboards, ask agents questions, and get accurate responses immediately – where you're already working. Embedded analytics enable everyone across your organization, from reps to managers to executives, to access personalized, tailored insights that boost efficiency, improve decision-making, and optimize both individual and team performance.

94%

of business leaders think they'd perform better if they could access data directly in the programs/ apps where they work.

Insights in the Flow of Work

Embedded Analytics

Empower your team with immediate visual context through rich, interactive pre-built dashboards.

Conversational Analytics

Turn data into a dynamic dialogue. Ask natural language questions to explore and uncover hidden insights, and get grounded, instant answers on demand.

Act on Insights

Shorten the distance from insight to impact. Drive faster decisions with proactive, AI-driven notifications that find you right where you work.

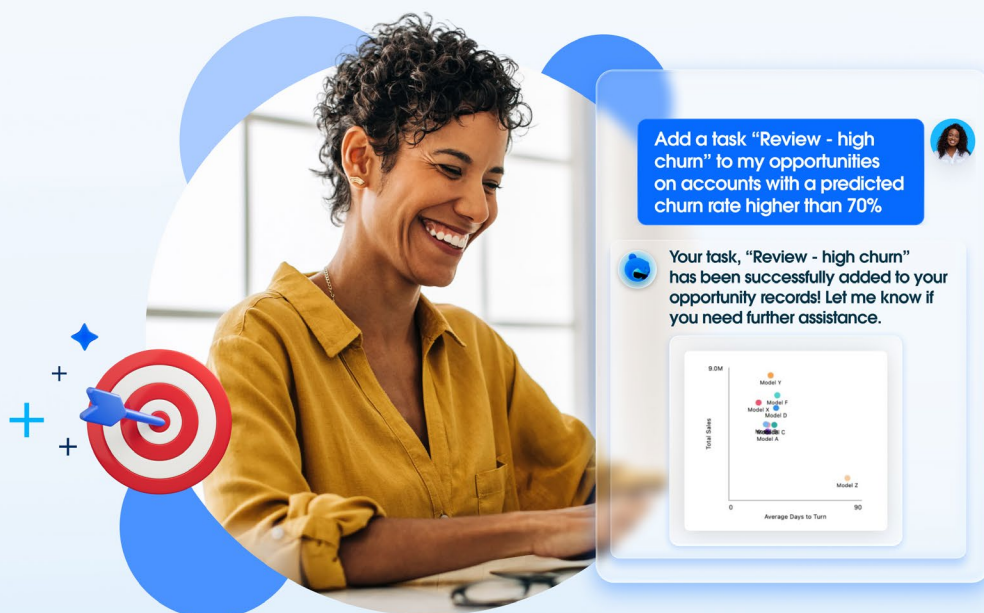# Bring Actionable Insights to Every Conversation

The ability to embed analytics where teams are already working is a game changer. The unification of conversations and analytics give users the ability to view, access, interact, and share KPIs, metrics, and dashboards right in their workflow – on desktop or on the go – to keep everyone aligned. By enabling the exploration of deeper insights in-context, it becomes easier to keep track of engagement, fuel cross-team collaboration, and turn insights into action quickly.

Users can ask natural language questions like "break down sales by product category" and the AI agent will pull data through the semantic layer, format it, and present actionable insights instantly.

The agent's comprehensive response is grounded in accuracy and designed for immediate action. This accelerates decision-making by enabling you to get, share, and act on insights wherever you're working – whether that be Slack, Salesforce, Tableau Next, or any other app of your choice.

How Agentic Analytics Accelerates Action

☑ **Agentic processing:** Summarizes information, performs calculations, and generates insights in natural language – making intelligence truly actionable across workflows.

☑ **Embedded action:** Dashboards and visualizations are tailored to specific use cases and integrate standard Salesforce actions and external links, allowing users to take the next step directly at the point of insight.

4

Customize and Expand for Your Business

Customize and Expand for Your Business

Using out-of-the-box analytics doesn't mean giving up customization. Modern, open, API-driven platforms are designed to be both composable and extensible, allowing teams to reuse and customize analytic building blocks so solutions stay relevant to the unique nuances of their business. Assembling analytics from modular components like data models, metrics, visualizations, workflows, and even AI-driven insights, enables faster time-to-value without sacrificing flexibility, agility, security, or governance. Because these components are interoperable, teams can evolve their solutions over time without having to rebuild systems, create new silos, or disrupt existing workflows. This makes it easier to embed intelligence directly into the tools, processes, and experiences teams are already relying on.

Interoperable analytics platforms help organizations maximize the value of existing analytics assets whether those be dashboards, reports, or existing data models. For example, organizations can build agentic experiences using trusted data from other tools – like CRM Analytics or Tableau. This means you can reuse trusted data models you already have, connect them in one unified semantic model, enrich it with additional data, and unlock conversational analytics on top of that data. By ensuring everything works together seamlessly, interoperable platforms not only negate the need to start from scratch, they also increase the lifetime and usefulness of what you've already built.

The Unified Analytics Platform Advantage

☑ Maximize existing investments: Use existing, trusted data from CRM Analytics or Tableau to build agentic experiences and unlock even more value from what you already have with interoperability.

☑ Scale innovation: Expand analytics throughout the enterprise with composable, verified analytics assets you can reuse, extend or embed into third-party applications.

☑ Future-proof: Take advantage of the latest AI innovation with pre-built analytics skills for Agentforce while still using the best tool for the job with a comprehensive, fully interoperable portfolio.

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from ☁ Salesforce

Your Competitive Advantage: Busting Data Silos with Purpose-built Analytics and Contextual, Action in the Flow
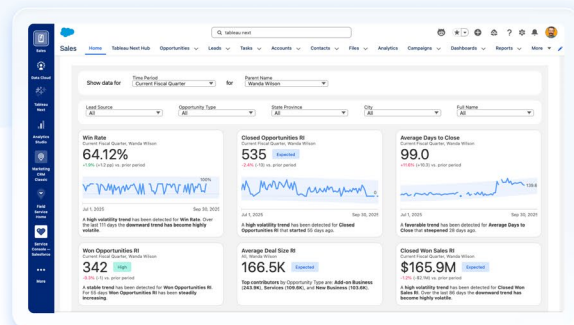
In a world where speed and intelligence determine who leads and who lags, the advantage will belong to organizations that can turn data into action, accurately and effectively. This is about more than being able to move faster. Winning in today's market requires that decisions be smart, aligned, and trusted. This makes solving the data dilemma far more than just an operational fix – it's a strategic mandate.

Companies enable themselves to eliminate friction and fragmentation by unifying data with predefined business context, deploying out-of-the-box solutions, delivering intelligence directly in the flow of work, and making it possible to customize solutions as the business evolves. Even more importantly, they empower teams and associates with the information they need to act confidently and quickly. A foundation that works for and scales with your business creates a more competitive, more aligned, and more agile organization – one where decisions are faster, execution is smarter, and insights drive measurable impact.

**Unlock Insights Across Salesforce
with Purpose-Built Analytics
powered by Tableau Next**

Learn how to remove the roadblocks between data and decisions by harnessing agentic analytics for supercharged outcomes across your entire business.

Watch the webinar

About Tableau from Salesforce

Tableau is more than just a business intelligence tool – it's an AI-powered platform that turns data into action. With a suite of agentic analytics and generative AI capabilities, Tableau helps everyone, in every industry, get the insights they need, proactively and without effort.

Built on a connected and adaptable platform, Tableau gives you the freedom to choose your architecture and scale as your AI strategy evolves. With enterprise-grade security, governance, and compliance built in, you can move with agility while keeping your data trusted and secure. Backed by the industry's largest partner ecosystem and a passionate global community, Tableau helps you unlock limitless possibilities with your data.

For more information, visit www.tableau.com.