



salesforce

# AI and Salesforce at Scale: Revolutionizing IBM Support and Sales

IBM is an enterprise transformation pioneer with a rich legacy of innovation spanning more than a century. Partnering with standouts like Salesforce and leveraging AI technologies such as watsonx, IBM embarked on a groundbreaking journey in 2017 that continues today.

This comprehensive case study delves into IBM's strategic journey of harnessing AI and Salesforce to revolutionize client support, sales operations, and ecosystem interactions, setting new standards for efficiency, growth, and client satisfaction. The result: a paradigm shift in enterprise dynamics, setting new benchmarks for success and resilience in the digital era.





# IBM BY THE NUMBERS

**280,000+ employees**

**20,000 support professionals**

**27,000 sales managers and executives**

**50,000 Consultants**

**25,000+ Strategic Ecosystem Partners**

## Client Support Transformation

IBM's commitment to service excellence propelled a substantial transformation in client support processes starting in 2017. Both client and agent feedback highlighted the complexity of support interactions and the desire for seamless, self-service solutions enabled by AI. Expectations were high, but the customer experience was lacking and ripe for transformation.

### IBM Client Support Transformation Objectives

1. Improve client support experience as measured by NPS
  - **Result:** Sustained 25-point increase in NPS
2. Provide new revenue growth opportunities
  - **Result:** \$400m in influenced revenue in just the first three years
3. Establish a more efficient, productive and affordable client support operation
  - **Result:** Sustained >25% reduction in operating costs
  - **Result:** More than 150 legacy service platforms and tools were retired (oldest was more than 50 years in production!)

IBM responded by integrating watsonx capabilities into Salesforce Service Cloud, ultimately leading to a significant 25-point increase in Net Promoter Score (NPS) and influencing more than \$400 million in revenue. The transformation journey focused on streamlining support operations, enhancing self-service capabilities, and delivering proactive support through AI-driven insights.

**“Our vision was clear: to provide clients with a seamless support experience centered on humans while powered by AI. The result is not just improved satisfaction but also tangible business growth. We proudly continue to uphold our commitment: ‘IBM Means Service.’”**

Bob McDonald, VP Global CRM Experience



Development and ongoing maintenance of the Client Support solution is based on four key principles that challenge team members to think beyond lift and shift:

- Design for the future, AI- and digital-first
- Out-of-the-box, zero customizations
- Investment in organization change management
- Stay agile: try, test, assess, adjust



## Deployed AI-enabled Processes

1. IBM watsonx Assistant self-service chatbot
  - **Result:** 125,000+ hours saved per quarter
  - **Result:** 26% reduction in total time to resolution in the first year
2. Case prioritization
  - **Result:** 45-minute time savings per support engineer per day
3. Knowledge search solution
  - **Result:** improved case deflection
4. Questions assistant
  - **Result:** more timely and accurate response from support agent
5. Case Summarization by watsonx
  - **Result:** 125,000+ hours saved per quarter

The strategic use of Salesforce's open architecture platform, coupled with the integration of watsonx capabilities, has been instrumental in IBM's Client Support Transformation success. Best-in-class technology adoption implemented using four shared principles have propelled IBM's transformative journey, setting the stage for a future of pioneering service excellence.

## Strategic Sales Transformation

The evolution of IBM's sales operations is equally transformative. Prior to 2021, IBM sales professionals required access to more than 100 unintuitive, disparate, and siloed tools. With an estimated 25% of seller time spent navigating internal processes, the opportunity to improve the prospect, customer and seller experiences was low-hanging fruit – but hinged on the selection of the right CRM that could handle IBM's enterprise complexity.



## IBM Sales Transformation Objectives

1. Improve the selling experience through streamlined processes
  - **Result:** 96 legacy sales tools were retired
  - **Result:** enriched client experience resulting from repurposing a 25% daily time savings
2. Provide a single source of truth for sales management
  - **Result:** sustained time savings resulting from elimination of spreadsheets, cadence calls and other means of sales tracking and reporting
3. Support and advance IBM sales models leading to revenue growth
  - **Result:** increase in leads passed to sellers in the first year
  - **Result:** decrease in response time to new inbound inquiries in the first year

IBM selected Salesforce Sales Cloud, enhanced by watsonx, as the central hub for its sales strategy. Deploying to Sales Cloud to 27,000 IBM sales professionals in one year was a strategic imperative to enable business commitments in line with

IBM's growth plans. The strategic integration of Salesforce platforms and AI technologies empowered sales teams with real-time insights, personalized recommendations, and enhanced collaboration capabilities.



**Sellers experienced a 25% increase in client engagement time, leading to higher revenue generation.**

Following the success of its Service Cloud implementation, IBM deployed Sales Cloud using the same formula: fast-paced, future-focused integration, AI- and digital-first, out-of-the-box before customizations, and an investment in change management.

**“Enterprises like ours are looking to AI to unleash tremendous productivity gains. The strategic integration of AI and Salesforce on IBM’s Sales Cloud did just that for our sellers — shifting focus from administrative to value-driven interactions.”**

Rob Thomas, Chief Commercial Officer





## Critical Integrations

1. Find an Expert
  - **Value:** reduction from days to minutes find sales support resources
2. IBM Client Support Portal
  - **Value:** transparency to customer success inquiries
3. Adobe Marketo Engage
  - **Value:** streamlined lead passing
4. LinkedIn Sales Navigator
  - **Value:** improved prospecting and brand building
5. ZoomInfo
  - **Value:** instant access to contact and company information

Salesforce Sales Cloud, enhanced with watsonx capabilities and other valuable integrations, has been instrumental in IBM's Strategic Sales Transformation success. Sales leaders benefit from robust dashboards and real-time opportunity tracking. Sellers spend more time deepening relationships. And the platform continues to evolve with IBM's business needs and aspirations.

## Partner Ecosystem Transformation

The rapid success of IBM's sales evolution led to the next major transformation enabled by AI and Salesforce: Partner Relationship Management. 2022 called for a revitalization of IBM's partner ecosystem to support its growth efforts. Partners were dissatisfied with the complexity of working with IBM and employees struggled to meet partner needs. The overall experience needed attention, and fast.

### IBM Ecosystem Transformation Objectives

1. Revise processes to simplify the ways of working between IBM and its partners
  - **Result:** 2-day deal registration approval reduced to immediate
  - **Result:** 1.5 day onboarding reduced to real-time program registration approval
2. Enhance the digital experience of the new Partner Program leading to revenue growth
  - **Result:** 43 legacy tools consolidated into single Partner Portal
  - **Result:** 54-page business partner agreement reduced to 3 pages

IBM selected Salesforce Experience Cloud, enhanced by watsonx and integrated with IBM's Sales Cloud instance, as its Partner Relationship Management solution. A revamped Partner Program--coupled with AI-powered engagement enabled by a new partner experience platform--simplified processes, accelerated revenue opportunities, and inspired deeper relationships between IBM and its strategic ecosystem partners.



**“The new Partner Program transformed how partners engage with IBM, leading to increased collaboration and revenue growth. The streamlined processes and enhanced support have strengthened our partnerships.”**

Kate Woolley, General Manager – Partner Ecosystem



## **AI Spotlight**

IBM's Business Partner engine, an AI solution developed using Watson Studio and Cloud Pak for Data short-named Partner Search, generates recommendations for best-fit partners based on calculated expertise metrics. Process automation then shares the opportunity with the partner if consent is given by the seller performing the search. This engine has already generated 105,000 successful pairings and for a total estimated 80,000 hours saved.

The transformation of IBM's ecosystem interactions was pivotal in driving growth and fostering stronger partnerships. AI-powered analytics allow IBM to identify market trends, optimize partner engagements, and drive mutual growth, laying the foundation for sustained ecosystem success.

## **Bridging Transformations**

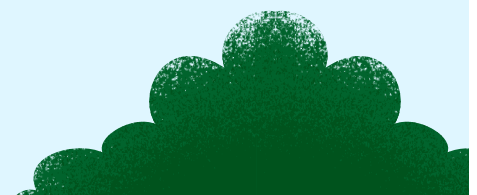
As presented, IBM's digital transformations may feel siloed. In fact, IBM has used cross-cloud and front-to-back-office integrations to keep its Service, Sales and Ecosystem solutions tightly aligned. IBM's workforce of 280,000 employees

has relied on Slack as the intelligent productivity platform at the center of its digital transformations. Slack enables IBM to automate busywork, connect employees, and facilitate knowledge sharing, contributing to impressive productivity gains.

IBM's support team ushered in a new era of customer support excellence with Slack. Swarming has become the cornerstone of IBM's customer service model. This process—where subject-matter experts are alerted in Slack about support tickets that could benefit from their focus area—quickly brings expertise and speeds time to resolution.

**“When I first introduced [Slack Sales Elevate] to our head of sales, he got his phone out, jumped in the channel, looked at the dashboard and said ‘This is the best thing ever!’”**

Michael Peeler, head of global digital transformation, analytics, and collaboration engineering

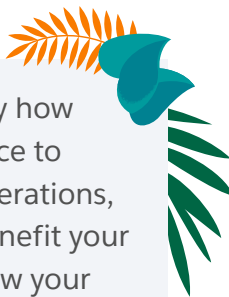




IBM sellers use Slack functionality to enable team selling, creating Deal Desk channels for collaboration. Sellers can jump between accounts quickly, execute their daily tasks, and close up their week in Sales Cloud—all without leaving Slack. Enhanced by Sales Elevate, which brings customer intelligence from Sales Cloud into Slack, IBM's sellers have lifted win rates while cutting approximately four days off the average deal cycle.

Slack's intuitive nature and ease of use have enabled IBM to enhance productivity, streamline communications, and foster a more inclusive and collaborative work environment.

Through Salesforce, and complemented by its own AI capabilities, IBM has harnessed the power of the platform to drive success across its business. IBM has overcome enterprise complexity and webs of legacy systems by sticking to a core set of digital transformation principles. This comprehensive approach not only enhances business growth but also fosters a culture of innovation and efficiency, positioning IBM as a leader in digital transformation.



You're invited to explore more deeply how IBM's experience leveraging Salesforce to revolutionize client support, sales operations, and ecosystem interactions could benefit your business. Contact us now to learn how your organization can overcome organizational complexity and legacy systems to drive success through digital transformation.



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