Salesforce Einstein Products Overview

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Einstein Recommendations

Einstein Recommendations is a feature within Salesforce's Einstein platform that uses **machine learning algorithms** to deliver personalized product and content recommendations to customers.

Designed to boost sales, improve engagement, and enhance customer experience, it **utilizes past behaviors and preferences** to **predict** what products or content a customer is most likely to engage with. It can be employed in various channels like websites, mobile apps, and email campaigns.
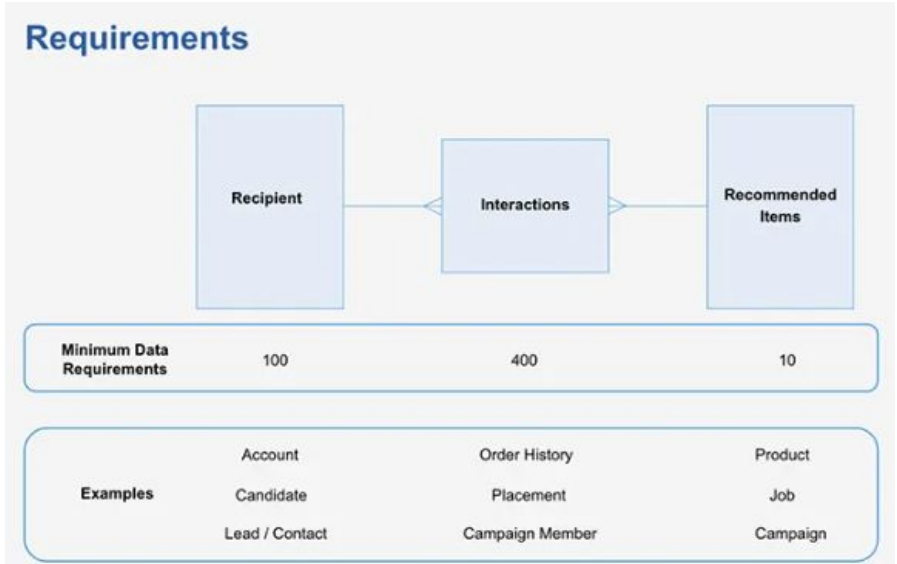

EINSTEIN RECOMMENDATION BUILDER

Data Model

To build an Einstein recommendation, you specify:

- **What** you want to recommend. This is your Recommended Items object. For example, the Products object includes swimming pool pumps.

- **Who** (or what) receives the recommendations. This is your Recipient object. For example, the Accounts object includes a swimming pool supply store.

- **Which** object stores interactions between the recommended items and the recipient. This is your Interactions Object.

  For example, *the Orders object stores a pool supply store's purchase of 800 pumps last month.*

Requirements

	Recipient	Interactions	Recommended Items
Minimum Data Requirements	100	400	10
Examples	Account	Order History	Product
	Candidate	Placement	Job
	Lead / Contact	Campaign Member	Campaign

Recommendations Use Cases

Use Case	Example
Upsell/Cross-sell Recommendation	Recommend top products that are best fit for a Contact/Account.
Next Best Offer	Recommend best offer/promotion to new or existing customers.
Next Best Action	Recommend best solution/action based on customer issue.
Field Service Work Order Enrichment	Recommend relevant parts to carry for service visit by field technician.
Candidate Recommendation	Recommend relevant candidates who are most likely to accept the job, or vice versa.
Customer-Partner Matching	Recommend most relevant partner solutions to your customers.
Campaign Recommendations	Recommend campaigns to audiences to improve email response rates.
Jobs Recommendations	Recommend relevant candidates who are most likely to accept a job to improve placement rates.
Case Resolution	Recommend best solution to cases to improve CSAT & time to resolution.

Workflow
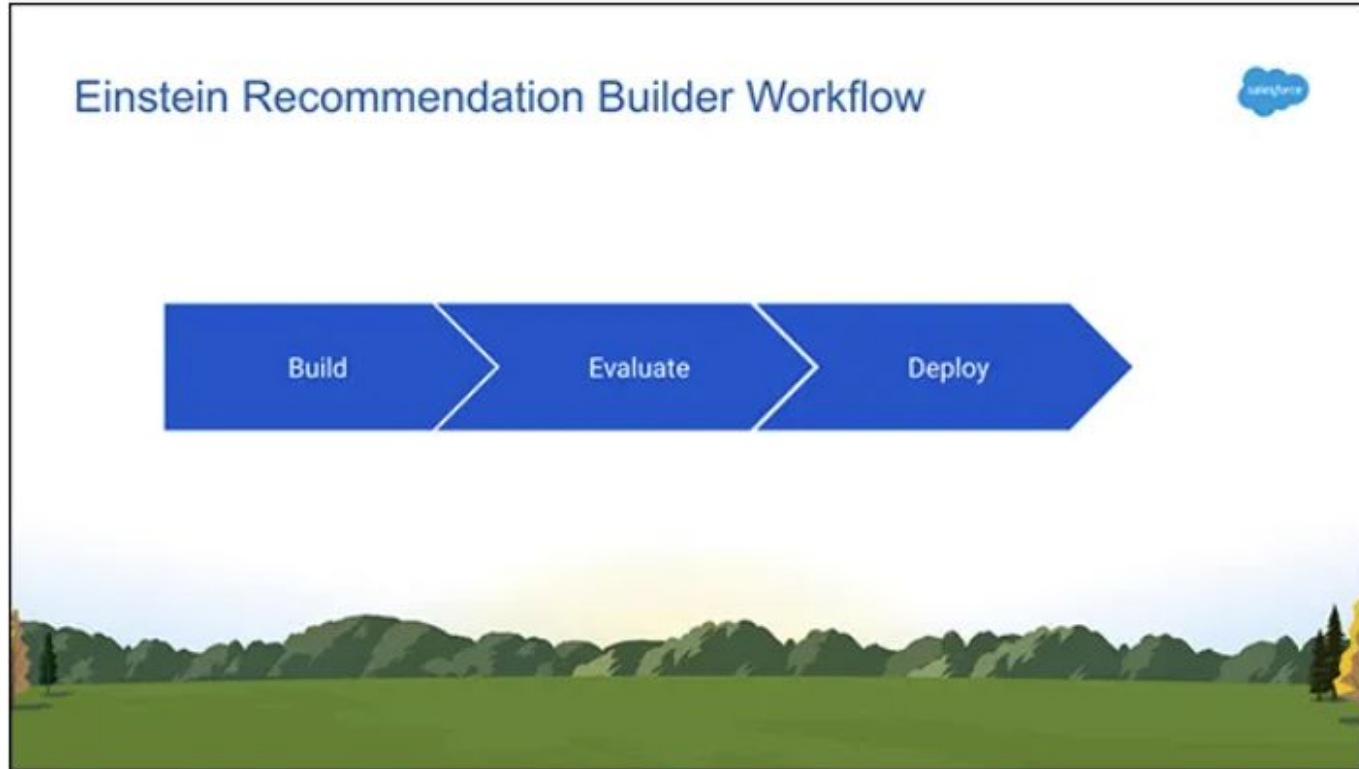
Key Features

- Personalization: Recommends products or content **tailored to individual customer behavior and preferences**.
- Real-Time Adaptability: Continuously **learns and adapts** its recommendations **based on new data**.
- Multi-Channel: Can be deployed across **multiple touchpoints** including e-commerce sites, mobile apps, and email.
- A/B Testing: Allows marketers to test the **effectiveness** of different recommendation **strategies**.

Benefits

- Increased Sales: More relevant recommendations lead to higher conversion rates.
- Improved Customer Engagement: Personalized experiences encourage customers to stay longer and interact more.
- Enhanced User Experience: Customers find what they're looking for more quickly, resulting in a more satisfying shopping or browsing experience.

Einstein Recommendations fits into the broader landscape of Salesforce's Einstein suite, which encompasses various AI and machine learning solutions tailored for CRM. Overall, it helps businesses make more informed, data-driven decisions to foster better relationships with customers.

How does it work?

Einstein Recommendations works by leveraging machine learning algorithms to analyze a variety of data points from customer interactions across multiple channels. The objective is to provide personalized recommendations that are most relevant to individual users. Here's an overview of its working mechanism:

> ***Scenario: Alice visits the website looking for a new laptop. She browses through several models, reads reviews, and adds one to her cart but doesn't complete the purchase. She also checks out a few headphones and phone accessories before leaving the site.***

Data Collection:

- The system collects data from various sources like customer browsing history, past purchases, clicked items, and more. This data serves as the raw material for the machine learning algorithms.

> ***The system collects data on Alice's browsing history, items clicked, time spent on each page, and items added to the cart.***

Data Processing:

- The collected data is cleaned, structured, and analyzed to identify patterns and trends. Factors like frequency, recency, and monetary metrics could be important depending on the type of recommendation being made.

> ***This data is processed to identify Alice's interest in laptops and accessories, giving weight to the laptop model she added to her cart.***

How does it work? (continued...)

Model Training:

- Machine learning models are trained using this processed data. These models are designed to predict customer behavior, like what products a customer is likely to buy next or what content they would like to see.

  Einstein Recommendations uses this data to update its predictive models, factoring in Alice's behavior along with data from other similar users.

Real-Time Analysis:

- As users interact with the platform, Einstein Recommendations performs real-time analysis to update its understanding of each user's behavior and preferences.

  The next time Alice visits the website, the system instantly recognizes her and uses real-time analysis to align its recommendations with her most recent activity and preferences.

Recommendation Generation:

- Based on the trained models and real-time data, personalized recommendations are generated. These could be product suggestions, content recommendations, or even promotional offers.

  Alice sees a section titled "Recommended for You," which prominently features the laptop model she had earlier added to her cart. Alongside, she sees recommendations for compatible laptop bags, high-rated headphones, and some phone accessories based on her previous browsing history.

How does it work? (continued...)

Multi-Channel Deployment:

- The generated recommendations can be deployed across multiple customer touchpoints, such as email, e-commerce websites, and mobile applications, to provide a cohesive and personalized user experience.

  Later, Alice receives an email featuring a special discount on the laptop model she had shown interest in, along with other recommended products. She also gets personalized recommendations when she uses the website's mobile app.

Continuous Learning:

- The system constantly updates its models based on new customer interactions and feedback loops. This ensures that the recommendations stay relevant and improve over time.

  Alice clicks on the laptop bag and makes a purchase. This new interaction is fed back into the system to refine future recommendations for Alice and users with similar behavior.

How does it work? (continued…)

Evaluation and Optimization:

- Businesses can utilize A/B testing to evaluate the performance of different recommendation algorithms or strategies. Metrics such as click-through rate, conversion rate, and average order value can be used for assessment.

    The e-commerce business periodically reviews metrics like click-through rates and conversions to assess the effectiveness of the Einstein Recommendations. Adjustments are made to optimize the recommendation engine further.

By combining historical data and real-time analytics, Einstein Recommendations aims to provide a highly personalized and dynamic customer experience that ultimately helps increase engagement, conversions, and revenue for businesses.

Einstein Predictions

Einstein Predictions is another aspect of Salesforce's Einstein AI platform, focused specifically on predictive analytics.

While Einstein Recommendations aims to suggest relevant products or content to users, **Einstein Predictions goes a step further** by generating forecasts about future events based on historical and real-time data.

Below is an outline of its key functionalities and use-cases...

Key Features

- Custom Predictive Models: Users can create custom models tailored to specific business needs, such as lead scoring or customer churn prediction.
- Pre-Built Models: Salesforce also provides pre-built predictive models for common business scenarios.
- Data Analysis: Uses a wide variety of data points, including structured and unstructured data, to make predictions.
- Real-time Predictions: Capable of providing real-time insights as new data becomes available.

EINSTEIN PREDICTION BUILDER

How It Works

1. Data Collection: Gathers historical data from Salesforce records or integrates with external data sources.
2. Data Preprocessing: Cleans and structures the data to prepare it for analysis.
3. Model Building: Algorithms are trained on the preprocessed data to create a predictive model.
4. Validation: The model is validated using a subset of the data to ensure its accuracy.
5. Deployment: Once validated, the model is deployed and begins making real-time predictions.
6. Continuous Learning: The model adjusts itself based on new data and feedback loops.

Example Use-Cases

- Sales Forecasting: Predicts which leads are most likely to convert into sales.
- Customer Churn: Forecasts which customers are at risk of leaving for a competitor.
- Inventory Management: Predicts stock levels needed for future demand.
- Marketing Optimization: Forecasts the effectiveness of different marketing channels.

Benefits

- Improved Decision-Making: Provides actionable insights that help make informed business decisions.
- Increased Efficiency: Automates the data analysis process, freeing up time for strategic tasks.
- Risk Mitigation: By identifying potential issues before they occur, businesses can take preemptive action.

Sales Cloud Einstein

Sales Cloud Einstein is Salesforce's AI-powered layer integrated into its Sales Cloud platform. This suite of intelligent features aims to optimize sales processes, provide actionable insights, and enhance productivity for sales teams. Here's a breakdown of some of the key components that are part of Sales Cloud Einstein:

Einstein Lead Scoring: Automatically ranks leads based on their likelihood to convert, helping sales reps prioritize their focus and efforts.

Einstein Opportunity Scoring: Provides a score for each sales opportunity, indicating its likelihood to close successfully. This helps sales teams prioritize their pipeline and focus on the most promising deals.

Einstein Activity Capture: Automatically logs emails and calendar events to related Salesforce records. This eliminates manual data entry and gives teams more time to focus on selling.

Einstein Automated Contacts: Uses AI to analyze emails and automatically update or create contact records in Salesforce, keeping the CRM data up-to-date without manual intervention.

Sales Cloud Einstein (continued...)

Einstein Forecasting: Utilizes predictive analytics to provide sales leaders with more accurate revenue forecasts, helping them make data-driven decisions.

Einstein Inbox: Offers a smarter email experience by providing contextual prompts and action suggestions within the email interface, making it easier to manage relationships and tasks.
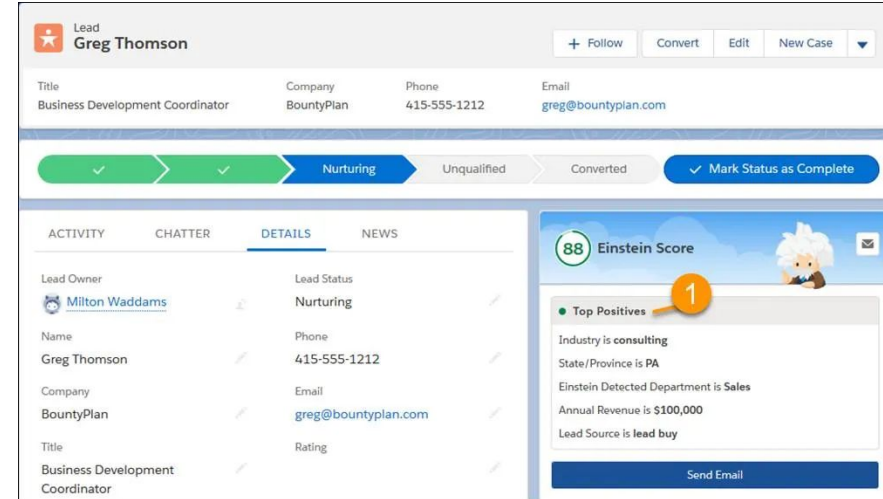
Einstein Relationship Insights: Surfacing key business and social connections, news articles, and other relevant insights, this feature helps sales reps prepare for meetings and engage more effectively with customers and prospects.

Einstein Call Coaching: Analyzes sales calls and meetings to provide insights on customer sentiment, competitor mentions, and key discussion points, helping sales reps and managers improve their strategies.

Einstein Voice Assistant: Enables reps to update records, take notes, and perform various Salesforce tasks using voice commands, thus improving productivity.

Einstein Lead and Opportunity Scoring

Einstein Lead and Opportunity Scoring are specific applications within Salesforce's Einstein AI platform aimed at prioritizing leads and opportunities in the sales funnel. These features use predictive analytics to help sales teams focus their efforts more effectively, ultimately aiming to increase conversions and revenue. Below is a detailed breakdown...

Understand How Einstein Scores Your Leads

Key Features

Automated Scoring: Automatically assigns scores to leads and opportunities based on their likelihood to convert or close.

Factor Analysis: Reveals the most influential factors affecting the score, such as industry, engagement level, or past interactions.

Real-time Updates: Scores are dynamically updated in real-time as new data comes in.

Seamless Integration: Fully integrated into Salesforce CRM, scores are directly visible within the lead and opportunity records.

How It Works

Data Aggregation: The system aggregates historical data of closed leads and opportunities, along with associated attributes and activities.

Model Training: A predictive model is trained on this aggregated data to identify patterns and indicators that lead to successful conversions or closed deals.

Scoring: Each lead or opportunity is then scored based on the trained model. The score represents the likelihood of a lead converting into a customer or an opportunity closing successfully.

Factor Analysis: Einstein also provides insights into the key factors that contribute to the score, enabling sales teams to understand what to focus on for improving the likelihood of conversion.

Real-Time Update: As new interactions occur or as other relevant data changes, the scores are updated in real-time.

Dashboard Integration: Sales teams can view these scores directly within their Salesforce dashboard, facilitating quick and informed decision-making.

Example Use-Cases

Prioritizing Leads: A sales rep can focus on leads with higher scores, ensuring that effort and time are spent on more promising prospects.

Risk Mitigation: Opportunity scores can help identify deals that might be at risk of not closing, allowing for timely intervention.

Resource Allocation: Sales managers can allocate resources more effectively by concentrating on high-scoring leads and opportunities.

Benefits

Increased Efficiency: Enables sales teams to prioritize their pipeline effectively, saving time that would otherwise be spent on less promising prospects.

Better Decision-Making: Detailed insights into influential factors provide a clearer understanding of what actions might improve conversion rates.

Higher Conversion Rates: Focusing on higher-scoring leads and opportunities often leads to improved conversion rates and thus, increased revenue.

Service Cloud Einstein

Service Cloud Einstein is Salesforce's AI-driven component integrated within its Service Cloud platform. Aimed at automating customer service operations, providing smarter insights, and enabling faster resolution of customer issues, Service Cloud Einstein enhances both agent productivity and customer satisfaction. Here's an outline of its key features and benefits:

- Einstein Bots
- Einstein Case Classification
- Einstein Case Routing
- Einstein Case Wrap-Up
- Einstein Article Recommendations
- Einstein Reply Recommendations
- Einstein Next Best Action

Service Cloud Einstein (continued...)

Key Components:

Einstein Case Classification: Automatically categorizes and routes incoming customer cases to the most appropriate agents, saving time and improving case resolution efficiency.

Einstein Case Routing: Utilizes machine learning algorithms to intelligently route cases to agents based on their expertise and availability, ensuring quicker and more accurate resolutions.

Einstein Bots: Provides automated chatbot services that handle common customer queries, freeing up human agents to focus on more complex issues.

Service Cloud Einstein (continued...)

Einstein Reply Recommendations: Offers real-time reply suggestions to agents based on historical data and context, speeding up response times and improving consistency.

Einstein Next Best Action: Provides agents with intelligent suggestions for the next steps to take during customer interactions, based on customer history and other data points.

Einstein Analytics for Service: Delivers advanced analytics that help service teams monitor performance, analyze trends, and gain actionable insights for improvement.

Einstein Predictive Customer Service: Uses predictive analytics to identify potential issues or customer dissatisfaction before they escalate, allowing for proactive action.

Additional Resources

- [Get Started with Einstein Recommendation Builder](#)
- [A Guide to 50+ Salesforce Einstein AI Products and Tools](#)
- [Guide to Service Cloud Einstein Features (+ Pricing)](#)
- [Sales Cloud Einstein (Documentation)](#)