THE BIG BOOK of CUSTOMER PREDICTIONS

Get closer to your customers with Salesforce Einstein.
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Introducing Salesforce Einstein

Meet Your Smart CRM Assistant

Einstein is your smart CRM assistant, empowering you with insights, predictions, and recommendations to connect to customers in a whole new way. Everyone can benefit from an assistant. And now, Einstein is here to help you work smarter than ever before – using the power of Salesforce. Einstein helps you by:

• Discovering hidden insights and patterns in your data
• Predicting outcomes for every function and industry
• Recommending the best action, offer, or engagement
• Automating business processes and workflows

Einstein makes every Salesforce app smarter with out-of-the-box predictions for every user, from scoring leads for sales and recommending the best answers for service to detecting your brand on social media for smarter engagement strategies. And what could possibly be better than smart apps that work right out-of-the-box? A platform to build your own custom smart apps. The Einstein Platform enables every admin and developer to build AI-powered apps – using clicks or code. Read on to learn all the ways you can use predictions to connect with your customers.

What Is a Prediction?

A prediction is a forward-looking estimate based on historical data. Today, businesses are using artificial intelligence (AI) and machine learning to generate predictions and embed those in their business workflows. Examples of the types of predictions businesses use include:

• Scores: For example, how likely is an invoice to be paid in the next three months?
• Estimates: For example, what will be the closed amount of an open opportunity?
• Classifications: For example, what should be the priority of a new incoming service case?

Businesses combine predictions with business rules to deliver smarter, more efficient workflows and better outcomes.
Build Your Own Smart Assistant
With Einstein Platform

With Einstein Platform, customers can build AI-powered assistants and apps by leveraging:

- **Einstein Voice**: giving you the ability to talk to salesforce and have an AI-powered assistant on any device

- **Einstein Bots**: enabling you to build a custom service chatbot trained on CRM data, natural language processing (NLP), customer and agent feedback using a simple point-and-click interface

- **Einstein Prediction Builder**: allowing admins to create custom predictions on standard or custom objects in Salesforce with clicks, not code, using a simple wizard

- **Einstein Discovery**: helping business analysts find key insights hidden in their data, explaining those insights using simple language, and then pushing these insights into Salesforce

- **Einstein Next Best Action**: delivering contextual recommendations at the moment of engagement by leveraging a combination of Salesforce data, third-party data, business rules, and predictive models

- **Einstein Vision and Einstein Language**: allowing every developer to build smarter apps using a set of APIs that give them the ability to leverage their unstructured image and text data

Now every Trailblazer can build smart assistants faster than ever.
Chapter 1:

PREDICTIONS FOR SALES

Blaze new trails to greater sales revenues with Salesforce Einstein.
Guide Sales Leaders and Coach Sales Reps With Sales Cloud Einstein

Sales organizations must stay abreast of trends within their business, across a range of perspectives, from regions to industries and from products to individual prospects.

Einstein Forecasting
Predict highly accurate, individualized sales forecasts so sales leaders know what to expect from the pipeline and why.

Einstein Lead and Opportunity Scoring
Predict which leads are most likely to convert and which opportunities are likely to close so sales reps focus on the right deals, every time.

Einstein Account Scoring*
Predict the likelihood of an account being receptive to your brand, messages, and products, so that you can identify and prioritize the right accounts and sell more.

BENEFITS
• Increase win rate
• Increase campaign ROI
• Improve resource allocation

* Product is in pilot.
Einstein Opportunity and Account Insights

Einstein identifies, surfaces, and prioritizes the most valuable deals – those with the largest deal size, most executive engagement, and more – directly within Sales Cloud so reps are always one step ahead.

Einstein Activity Capture and Automated Contacts

No rep should ever have to do data entry. Activity Capture grabs the email at the server and automatically logs it in Salesforce. Even calendar meetings and new contacts are logged automatically in Salesforce.

Einstein Email Insights

Einstein Email Insights identifies the most important emails and recommends the best action or response, so sales reps and leaders can prioritize their inbox and quickly address customer needs.
More Predictions to Deliver Smarter Sales

Custom predictions enable leaders to identify a range of actionable insights – from which territories to prioritize, to which teams need to grow, to which reps need coaching. There are benefits for reps too. Reps can predict which products customers are likely to be interested, which assets will help them close the deal, and more.

Propensity to Buy
Predict the likelihood of a customer or prospect purchasing a particular product, so that you can prioritize the products you target for your customer and sell more.

Contact Scoring
Predict the likelihood of a person being receptive to your pitch and your products to maximize your selling time.

Territory Scoring
Predict the likelihood of a zip code having business opportunities for your products, so that you can target the appropriate neighborhoods and sell more.
Chapter 2:

PREDICTIONS FOR SERVICE

Blaze new trails to happier customers with Salesforce Einstein.
Assist Service Agents With Service Cloud Einstein

Service organizations must stay connected with their customers across every channel in order to create blazing customer success. Agents face the challenge of reaching new levels of productivity whether they are out in the field or in call centers.

Einstein Bots
Easily build, train, and deploy custom bots – trained on your CRM data – to augment business processes, empower your employees, and delight your customers. With Einstein Bots you can automatically resolve routine customer requests or collect and qualify customer information for seamless agent handoff.

Einstein Agent*
Turbocharge agent productivity by making automatic predictions on case fields, triaging cases and intelligently routing them to the right agents for fast resolution.

BENEFITS
• Reduce churn/attrition
• Increase adoption
• Decrease case resolution time

* Product is in pilot.
More Predictions to Deliver Smarter Service

Custom predictions enable agents to use the power of data and AI to resolve cases faster than ever and be proactive with customer care. Predictions can drive processes to create intelligent customer self-service experiences to make customers happier than ever before.

Customer Churn Risk
Predict the likelihood of a customer leaving so that you can intervene and keep your customer happy.

Product Upsell or Cross-Sell
Predict the likelihood of a customer or prospect purchasing a particular product, so that you can prioritize the products you target for your customer and sell more.

Next Incident
Predict the likelihood of a customer experiencing an incident so that you can deliver proactive service to your customer.
More Predictions to Deliver Smarter Service

Onboarding Success
Predict the likelihood of a customer reaching adoption milestones within the first 30–60–90 days of becoming a customer.

Propensity to Escalate
Predict the likelihood of a customer escalating a case to social media, so that you can keep your customer happy.
Chapter 3:

PREDICTIONS FOR MARKETING

Blaze new trails to customer engagement across every channel with Salesforce Einstein.
Create Smarter Consumer Journeys With Marketing Cloud Einstein

Marketing organizations must deliver personalized experiences to every customer in every industry in every encounter. Marketers face the challenge of designing the right journeys for their customers in an ever-changing customer landscape.

Einstein Engagement Scoring
Predict whether customers are likely to engage with, convert, or churn from your marketing campaigns so that you can optimize audience planning and increase lead generation, conversion, and campaign ROI.

Einstein Recommendations
Predict which content or products a customer is most likely to engage with to create a more personalized experience and connection with your customer.

Einstein Journey Insights
Predict the most effective marketing touchpoints and the optimal sequence of events that lead to conversion to improve marketing ROI.

**BENEFITS**
- Increase lead generation, conversions, average order size, and revenue by campaign
- Save time on execution/analysis
- Save money with more targeted marketing
Einstein Vision for Social Studio
Detect brand logos, common scenes, and other objects in images on social media to identify your customers and manage your brand.

Einstein Social Insights
Gain deeper insight into your customers by analyzing social conversations with natural language processing to predict influencers, sentiment, and language.
More Predictions to Deliver Smarter Marketing

Custom predictions enable marketers to use the power of AI to deliver personalized experiences, incorporating the organizational needs of businesses and the expectations of individual customers. Predictions can drive customized engagements that connect with customers better than ever before.

Lifetime Value
Predict the total purchase amount by the customer so that you can prioritize and better connect with your customers.

Title Classification
Predict the job levels and functions of a contact based on their title, industry, country, and other factors so that you can classify web-to-lead fields into clean segments.
Chapter 4:

PREDICTIONS FOR COMMERCE

Blaze new trails for personalized shopping experiences with Salesforce Einstein.
Create Personalized Shopping Experiences With Commerce Cloud Einstein

Retailers can now turn the extensive amount of valuable data within their commerce platform into actionable insights to inform and help create the most engaging experiences.

**Einstein Product Recommendations**
Predict the best product for each customer so that they can easily navigate to the products that will drive them to conversion.

**Einstein Predictive Sort**
Predict the best order of products in category or search results so that shoppers can find products relevant to them without wasting time scrolling.

**Einstein Search Dictionaries**
Predict the search terms that need to be added to search dictionaries to ensure that shoppers always see the most relevant results onsite.

**Einstein Commerce Insights**
Predict which products should be bundled or displayed together based on shopper purchase data.

**BENEFITS**
- Increase order size
- Increase purchase rates
- Increase customer lifetime value
More Predictions to Help Every Retailer

Custom predictions enable retailers to use the power of data and AI to deliver personalized shopper journeys, while also layering in specific business context. Predictions can connect shoppers with the best products for them, driving conversion and increasing the probability a shopper will return to the site.

Lifetime Value
Predict the total order value by the customer so that you can prioritize and better connect with high-value customers.

Propensity to Return
Predict the likelihood and frequency of a customer returning so you can engage them on the appropriate marketing journey.
Chapter 5: Predictions for HR, Finance, and IT

Blaze new trails to smarter apps across every department with Salesforce Einstein.
Every Trailblazer Can Build AI-Powered Apps With the Einstein Platform

IT organizations must address a wide variety of needs across the business – from sales, service, and marketing, to finance and human resources. Developers face the challenge of solving complex business problems without the necessary time and resources.

Building custom predictions with clicks or code enables admins and developers to create a whole new world of opportunities for IT to drive business transformation. Predictive apps for every business unit create beneficial customer and employee experiences and empower your business to blaze new trails of customer success.

PREDICTIONS FOR HUMAN RESOURCES

Staffing Growth
Predict human resource demands so that you can right size pipeline for employee headcount increases.

Offer Acceptance
Predict the likelihood of a candidate accepting an offer so that you can hire the best talent.
Inclusion and Engagement
Predict the level of employee engagement and inclusion so that you can offer the right training to foster an inclusive culture.

Employee Attrition
Predict the likelihood of an employee leaving the company so that you can re-engage the employee and prevent regrettable attrition.

Employee Potential
Predict the likelihood of an employee being a high performer so that you can develop the employee and retain high-performing talent.

Recommended Training
Predict employee development and growth plans to increase engagement, productivity, and retention.
More Predictions For Every Department

PREDICTIONS FOR FINANCE

Contract Risk
Predict the likelihood of a contract being high risk based on exit clauses so that you can negotiate favorable contracts.

Payment Risk
Predict the likelihood of a customer missing a payment so that you can improve revenue forecasts.

PREDICTIONS FOR IT

Project Risk
Predict the likelihood of a project missing its delivery date so that you can better allocate resources and reduce project costs.

Equipment Loss
Predict the likelihood of breakage or loss of employee equipment so that you can improve security and plan for replacement inventory.
Chapter 6:

SMARTER APPS FOR EVERY INDUSTRY

Blaze new trails to smarter apps across every industry with Salesforce Einstein.
Build Smarter Apps For Every Industry With the Einstein Platform

Salesforce Einstein offers customizable AI that admins and developers in any industry can use to build predictions for any use case. For example, Einstein can predict attrition in financial services, support case deflection in retail, optimize shelf space in consumer goods, and more.

**PREDICTIONS FOR FINANCIAL SERVICES**

**Client Lifetime Value**
Predict which client will drive the highest lifetime revenue.

**Client Churn Risk**
Predict the likelihood of a client leaving.

**Damage Severity**
Predict the initial assessment of damage severity for a claim.

**Assets Under Management**
Forecast the asset acquisition for a brokerage.
PREDICTIONS FOR CONSUMER GOODS

Consumer Demand
Predict the demand for products by store location.

Inventory Compliance
Detect share of shelf and product display compliance.

Brand Detection
Detect your brand and products in social photos.
More Industry Predictions

PREDICTIONS FOR HEALTHCARE AND LIFE SCIENCES

Physician Referral
Predict the likelihood of a physician making a referral.

Readmission Risk
Predict the likelihood of a patient being readmitted to the hospital.

Treatment Adherence Score
Predict the likelihood of a patient adhering to a treatment plan.

Length of Stay
Predict the number of hours or days a patient will be in the hospital.

Medical Device Failure
Predict the time between failure of medical instruments and devices.
PREDICTIONS FOR MANUFACTURING

Product Quality
Predict production line defects and other product quality problems.

Production Yield
Predict the output of a production or manufacturing process.

Customer Acceptance
Predict the likelihood of a B2B customer rejecting parts or goods.

Shipping and Deliveries
Predict the likelihood of delays in shipment and deliveries.

Line Equipment Maintenance Emergencies
Predict which lines or machines may require intermittent service.
More Industry Predictions

PREDICTIONS FOR HIGHER EDUCATION

Student Matriculation
Predict the likelihood of a student to attend upon acceptance.

Graduation
Predict the likelihood of a student graduating.

Education Path
Recommend majors, minors, and accelerated courses for a student education plan.

Counseling Referrals
Recommend counseling services based on student behavior.

Dining Services Demand
Predict the number of students requiring dining services.

School Logo Detection in Social Media
Detect your school’s logo and brand in social photos.
PREDICTIONS FOR NONPROFIT

Capacity to Give
Predict whether a donor prospect will donate and what donation amount will best suit them.

Likelihood of Becoming a Recurring Donor
Predict if a one-time donor will become a recurring donor or major gift bestower.

Peer-to-Peer Fundraiser Potential
Predict whether a donor is likely to lead, organize, and coordinate a fundraiser to multiply the donor’s giving.

Program Completion Potential
Predict if a participant will complete a nonprofit program.

Next Best Volunteer Activity
Predict the best volunteer events and tasks for a team or individual based on their interests and history.

Client Testimonial
Predict whether a donor, volunteer, or beneficiary will write a positive impact story or testimonial.

Fundraising Campaign Target
Predict the probability of meeting donation and giving goals for a specific campaign.
Getting Started: What Will You Predict?

Now every Trailblazer can build an AI-powered assistant faster than ever.

With Salesforce Einstein, you can rapidly progress from prototype to pilot to scale. Start building now. Track ROI and performance along the way with A/B testing through pilot rollouts and see the value yourself.

Data Considerations

If you can track it, you can predict it. Choose a repeatable workflow that you can report on to build your prediction. Then take the time to identify the data that will enable the best quality signal for your prediction. More data connected to Salesforce means more options with predictions, and better-quality data means better-quality predictions.

Embed Predictions across Your Business

With Salesforce Einstein, leaders and teams work smarter than ever with predictions surfaced in record pages, list views, and reports. Save time with intelligent business process automation driven by predictions.

Become a Trailblazer in AI. Learn the latest features of Salesforce Einstein on Trailhead.

Learn more at trailhead.einstein.com.
Take the Product Tour
www.einstein.com