THE TRAILBLAZER’S GUIDE TO AI
How Leading Companies Are Transforming Their Industries with Artificial Intelligence
Companies do amazing things with Einstein. They make decisions faster, enable employees to be more productive, and make customers happier. You can do that too with artificial intelligence built right into Salesforce.

With Einstein, you can:

• **discover** hidden insights in your data, like the main factors driving customer satisfaction

• **predict** outcomes across every role or industry – for example, knowing which deals are most likely to close

• **recommend** the best action, such as how to keep a customer happy, by giving them the most attractive offer

• **automate** business processes and workflows, like making agents more productive and customers happier, with an AI-driven chatbot

But don’t take our word for it. Let’s take a look at what some of the most innovative companies are doing with Einstein.
## CONTENTS

<table>
<thead>
<tr>
<th>Chapter One: High Tech</th>
<th>01</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZENCONNECT</td>
<td>04</td>
</tr>
<tr>
<td>Penrod</td>
<td>06</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chapter Two: Education Services</th>
<th>07</th>
</tr>
</thead>
<tbody>
<tr>
<td>College Forward</td>
<td>10</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chapter Three: Financial Services</th>
<th>11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Haventree Bank</td>
<td>14</td>
</tr>
<tr>
<td>COMPEON</td>
<td>16</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chapter Four: Professional Services</th>
<th>17</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPL</td>
<td>20</td>
</tr>
<tr>
<td>Robert Half</td>
<td>22</td>
</tr>
<tr>
<td>PWC</td>
<td>24</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chapter Five: Healthcare &amp; Life Sciences</th>
<th>25</th>
</tr>
</thead>
<tbody>
<tr>
<td>One Call</td>
<td>28</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chapter Six: Automotive</th>
<th>29</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auction Nation</td>
<td>32</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chapter Seven: Retail</th>
<th>33</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asics</td>
<td>36</td>
</tr>
<tr>
<td>Room &amp; Board</td>
<td>38</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chapter Eight: Media &amp; Comms</th>
<th>39</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telstra</td>
<td>42</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chapter Nine: Real Estate</th>
<th>43</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elegran</td>
<td>46</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chapter Ten: Travel &amp; Transportation</th>
<th>47</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trasmediterránea</td>
<td>50</td>
</tr>
</tbody>
</table>
The high-tech industry is in a constant state of change, where businesses always need to stay ahead of their customers’ needs and anticipate what’s coming next. Learn how Einstein empowers leading businesses with the predictions they need to proactively reduce customer churn and grow recurring revenue over time.
“Einstein Automated Contacts reduced contact creation from two minutes to mere seconds.”

YOHANN LECORNET
CTO
**Company Overview:**

It’s all in the name: ZENCONNECT allows people to log in (and get down to work) with zen-like ease. This 30-employee startup specializes in B2B network managed services.

**Business Challenge:**

With more than 160 clients and experiencing rapid growth, ZENCONNECT soon began to ask themselves: How can we manage teams and processes smoothly, without any loss of productivity? Time is a scarce resource and has been a key factor in ZENCONNECT’S success. And that is where the choice of Salesforce has paid off particularly well.

**Salesforce Solution:**

Since November 2016, Salesforce has acted as the CRM for sales staff, the technical support tool, the marketing strategy support system, and the dashboard for senior management. To accelerate the integration of all of these processes, ZENCONNECT has taken advantage of the business-specific apps available on AppExchange. In this cutting-edge service sector, success depends on the speed of execution in answering a client’s request.

**Results:**

20% increase in productivity
“Sales Cloud Einstein gives us actionable insights to focus on filling pipeline with solid opportunities.”

DREW THORNESBERRY
VP OF SALES AND MARKETING
**COMPANY OVERVIEW:**

Penrod builds engagement platforms and enduring business relationships through innovative Salesforce solutions. They provide organizations with automated platforms and streamlined processes to enhance their customers’ overall experiences.

**BUSINESS CHALLENGE:**

Human capital is expensive. When you don’t think you have enough, you hire which is really expensive – especially if you over hire. But under-staffing can hurt your delivery standards. Forecasting in Penrod’s business is really hard, so any improvement and insight they can get makes it much more manageable and provides a ton of value.

**SALESFORCE SOLUTION:**

All of this is being provided by Sales Cloud Einstein. The team at Penrod is having much more confident conversations as they continue rapid growth and need that growth to be sustainable.

**RESULTS:**

- 45% increase in deal size
- 48% increase in win rate
The success of every education services provider is strongly based on building meaningful relationships. Leaders are now looking for a way to become more proactive with their data, even with limited resources – and they’re using artificial intelligence to do so, leveraging Einstein to predict industry-specific outcomes.
“Einstein’s predictive power ensures that we get the right help to the right students when they need it most.”

AUSTIN BUCHAN
CEO
**Company Overview:**

College Forward is an Austin-based nonprofit whose intensive, culturally-appropriate mentoring programs propel students from underserved backgrounds to collegiate success and remunerative careers.

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**Business Challenge:**

College Forward is a business that is focused on building meaningful relationships. Data tracking is an integral part of the non-profit’s DNA; however, they were looking for a way to become more proactive with their data tracking. Like many nonprofits, resources are limited. In terms of analysis, they spent a lot of time working in Excel and feeding that information manually into Salesforce.

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**Salesforce Solution:**

College Forward entered the pilot program for Einstein Prediction Builder in the summer of 2017.

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**Results:**

13,000 students being managed with Salesforce
Because they are used to the ease of ecommerce in their day-to-day lives, consumers expect the same standard with their financial services providers. This focus on customer experience is leading banks, insurance, and wealth management companies to implement AI to meet their customers’ unique needs with a more personalized approach.
“We are at the forefront of AI compared to our competition due in part to Einstein Prediction Builder and Einstein Discovery.”

ALEX WESTCOTT
SALES OPERATIONS
**COMPANY OVERVIEW:**

Haventree Bank is an alternative mortgage lender in the Canadian market. The company aims to lend based on the stories that they hear from their clients, and not so much based on the profile of what an ideal client should be.

**BUSINESS CHALLENGE:**

Alex Westcott, Sales Operations Analyst, transformed Haventree’s Salesforce instance from zero to 360. When Alex joined the company less than two years ago, the company wasn’t using Salesforce. In fact, Haventree Bank hardly had internal support and enablement. Additionally, the bank had been growing at a rapid rate (30% YOY), so the company needed a CRM that would keep up with its growing number of clients.

**SALESFORCE SOLUTION:**

Haventree is now building internal processes and teams around Salesforce, across Sales Cloud, Service Cloud, Marketing Cloud, Einstein Analytics, and Platform. Once Haventree built a solid CRM foundation, Westcott looked to Einstein Prediction Builder and Einstein Discovery to uncover unexpected insights and improve pipeline efficiencies and loan renewals.

**RESULTS:**

- **139%** YOY increase in 3-year loan units
- **4%** increase in 3-year loan portfolio within 90 days
“Einstein Prediction Builder helps our financial advisors prioritize their time based on the highest scoring opportunities.”

ALEX BIERHAUS
MANAGING DIRECTOR
**COMPANY OVERVIEW:**

Working with more than 220 banks, leasing companies, and special providers, COMPEON is Germany’s leading financing portal for SMBs, handling financing inquiries with a total volume of €2.5 billion every year.

**BUSINESS CHALLENGE:**

COMPEON’s sales agents act as financial advisors and bankers. Because their skillsets are so varied, they were overwhelmed with the number of opportunities to follow up on. That’s why COMPEON started exploring how AI could help advisors and bankers prioritize the opportunities to pursue. They chose Salesforce Einstein because they trusted Salesforce and also because their CRM data was already there.

**SALESFORCE SOLUTION:**

Because of the high amount of custom fields on their opportunity object, COMPEON chose to evaluate Einstein Prediction Builder. With Einstein, COMPEON can predict which opportunities are most likely to close. After an evaluation phase, they were able to test and validate the model by comparing the model’s outcome with actuals.

**RESULTS:**

50 financial advisors and bankers leverage Einstein opportunity scoring
In every type of service, professionals now need access to real-time insights that are specific to their markets and needs. Since finding recommendations from Einstein, leading players have been able to adjust the way they engage and connect with their clients.
“By embracing artificial intelligence, we can deliver better outcomes for our candidates, clients, and the business.”

KEVIN SWEENEY
IT DIRECTOR
COMPANY OVERVIEW:
CPL is Ireland’s largest recruitment agency with over 400 specialist recruiters spanning across 11 countries and 41 offices worldwide. CPL’s goal is to power business growth through people and help identify an ideal job for every candidate.

BUSINESS CHALLENGE:
In order to support company growth in the evolving recruiting industry, CPL needed to be able to quickly identify the best candidates for a specific job. CPL has been successfully tracking its candidates and clients via Salesforce since 2010. However, CPL was ready to take their data to the next level and leverage intelligent predictions. The challenges around recruiting are similar to a sales cycle – some clients will complete the journey and some will fall through. It is difficult to identify what constitutes a good candidate and how to predict those traits.

SALESFORCE SOLUTION:
With Sales Cloud as their foundation, CPL now uses a custom-built application with Heroku and Einstein to better understand the likelihood of client success.

RESULTS:
1.5 MILLION candidates processed via Salesforce
“We’re excited to see the power of 300 locations in 18 countries using intelligent recommendations and data-driven, actionable insights.”

JAMES JOHNSON
VP OF INFORMATION TECHNOLOGY
INDUSTRY:
Professional Services

SEGMENT:
Enterprise

PRODUCTS OR FEATURES:
Service Cloud, Einstein Analytics

COMPANY OVERVIEW:
Robert Half connects employers and job seekers to staff positions in finance, law, technology, and more.

BUSINESS CHALLENGE:
Robert Half wanted to reduce workload of their data science team and help front-line employees identify important patterns in a self-service way. The company’s aim was to improve staffing consultant productivity in 18 countries and 300 locations around the world.

SALESFORCE SOLUTION:
The company adopted Einstein Analytics to extend their Service Cloud investment. Now, they can deliver real-time, data-driven recommendations and insights to staffing professionals – specific to their markets. Best of all, these insights are integrated directly into Salesforce.

RESULTS:
300 locations benefiting from intelligent recommendations
“Einstein Analytics can be easily configured and allows our non-technical employees to do more advanced reporting than ever before.”

MIKE HOODY
PWC ADVISORY PARTNER
COMPANY OVERVIEW:

PWC provides professional services, including audit and assurance, tax and consulting, and human resources that support a global network of more than 236,000 people in 158 countries. PWC resolves complex issues and helps businesses thrive.

BUSINESS CHALLENGE:

Due to the nature of its business, each PWC territory acts as a separate company. Because of this, every country in the PWC network operated on a different technology stack, some with little overlap. To maintain consistent data and bridge these technological gaps, PWC started the initiative to consolidate into one global platform.

SALESFORCE SOLUTION:

PWC provides client service professionals with the ability to act from their data. PWC client service professionals act as their “sales team.” They work with clients to complete projects, which then results in revenue. In addition, market leaders now have the ability to view all of their data in one place and easily report on segmentation and financial data.

RESULTS:

145 countries operating with streamlined technology
Medical device companies, pharmaceutical companies, provider networks, health and human services, and public agencies – this entire Healthcare and Life Sciences ecosystem is looking into new ways to foster healthier outcomes. By analyzing their data with Einstein, key players are able to take better-informed actions proactively, providing an improved patient experience.
“Einstein Voice helps our sales teams keep accurate and detailed notes on who we met with and what we discussed linked directly to Salesforce.”

JENNY FISHER
DIRECTOR OF SALES TECHNOLOGY
**Company Overview:**

One Call is the industry’s leading provider of specialized solutions to the workers’ compensation industry. Headquartered in Jacksonville, Florida, the healthcare network management company employs close to 1,500 people across six locations nationwide.

**Business Challenge:**

One Call started their Salesforce journey in 2003, and the initial use case was focused on tracking sales data (contacts) and service data (cases). Over the last 5 years, One Call has acquired 27 companies which all had data in siloed systems. One Call quickly realized they were looking for a solution to further automate processes and combine old legacy systems to better understand their vast customer base.

**Salesforce Solution:**

One Call has consolidated their Salesforce systems to have one single view of their customer base. The company has also migrated to Lightning, and they now leverage Einstein Voice to better track customer status and notes.

**Results:**

2X increase in monthly mobile adoption with Einstein Voice
Artificial intelligence in automotive is not just about self-driving cars. Automotive companies are now tracking more data than ever before. They are in a position to analyze customer and vehicle data with AI and are using Einstein to optimize their processes and enhance customer satisfaction.
“Einstein Vision gives us the competitive advantage to better predict how to price and distribute our inventory.”

ERROL LEVIN
CHIEF OPERATING OFFICER
**COMPANY OVERVIEW:**

Auction Nation is a South African car auction company that sells vehicles that can’t be repaired. It is the leading service provider of outsourced procurement solutions for major insurance companies, auto-body repair, accident management, independent assessment yards, salvage management, and vehicle logistics.

**BUSINESS CHALLENGE:**

One challenge of working with salvaged vehicles is that they range in price depending on their level of damage. As Auction Nation’s business started to scale, the process of analyzing each vehicle was becoming less efficient because each had to be manually assessed for damage. This led to a bottle-neck in the process.

**SALESFORCE SOLUTION:**

Auction Nation turned to Einstein Vision to apply AI into its vehicle review process, which reduced the time spent manually assessing vehicles. They also use Einstein Discovery to know where and for how much similar vehicles sold based on past purchase behavior, allowing them to sell vehicles for the best return.

**RESULTS:**

$2.25M estimated savings for insurers with Einstein Vision
The retail industry is all about putting the right product and service in front of customers at the right time. Leading companies leverage their vast amount of data and use artificial intelligence to more accurately target their customers, and increase overall customer lifetime value.
“Our goal is to present the customer with content that is relevant, not invasive.”

KIMBERLY RUTHENBECK
DIRECTOR OF WEB CUSTOMER EXPERIENCE
COMPANY OVERVIEW:

For more than 30 years, Room & Board has focused on the simple idea that good design should be beautiful, affordable, and long-lasting. The company works closely with American artisans to offer modern furniture and accessories – even custom pieces – that fit the needs of modern life.

BUSINESS CHALLENGE:

In the highly competitive home furnishings industry, Room & Board sought to further differentiate its customer experience by making its ecommerce site interactions more like its in-store experience. The marketing and merchandising team controlled all the content, product placements, and recommendations on the web and in email communications, but sought a more sophisticated and automated means to provide recommendations to online customers.

SALESFORCE SOLUTION:

After reviewing various solutions available in the marketplace, Room & Board selected Salesforce Marketing Cloud because of its Predictive Intelligence capabilities. The team worked with Salesforce professional services for about three months to build out the product recommendations algorithms, import both online and offline sales and marketing data, and launch the new analytics-driven website.

RESULTS:

1.5X higher conversion rates
In a highly competitive market, the window of opportunity to introduce new products, offers, or promotions can be short. This is why leading media and communications companies always need to be proactive. With Einstein, they can analyze past data to predict future behaviors, such as determining the best offer for each customer, before the customer asks.
“Einstein Analytics will be a key differentiator to win in our markets based on superior customer insights that lead to a more targeted and proactive sales motion.”

MIRKO GROPP
DIGITAL ENABLEMENT PRINCIPAL
COMPANY OVERVIEW:

Telstra Corporation Ltd. is Australia’s largest telecommunications company which builds and operates telecommunications networks and markets voice, mobile, internet access, pay television, and other products and services.

BUSINESS CHALLENGE:

Telstra didn’t have a single system to maintain and visualize their data. Instead, the company used a variety of tools including email, Excel, PowerPoint, Tableau, and other solutions to try to achieve that one single source. Plus, their existing CRM had to be updated manually. It was not equipped to enter data at every step though the sales cycle, which made it a tool that held deals once they were closed.

SALESFORCE SOLUTION:

Telstra adopted Sales Cloud and Einstein Analytics to create a single source of truth for their data and better understand their business activities.

RESULTS:

+80 NPS point increase

27% increase in sales pipeline
Leading real estate companies have a clear goal: leverage and grow marketing and technology to change their industry. They are transforming service to their clients and support for their agents, building 1:1 journeys driven by Einstein.
“Using Pardot has opened up new channels of business and automated a lot of the redundancy of sales teams’ day-to-day activities.”

TIGH LOUGHHEAD
MARKETING DIRECTOR
COMPANY OVERVIEW:
Elegran is a fast-growing Manhattan-based luxury real estate firm specializing in brokerage and developer services. Over the past decade, the company has built a reputation for providing superior service to clients and unparalleled support to agents.

BUSINESS CHALLENGE:
Elegran has been a Salesforce customer since 2009. They developed on a Force.com license – and wanted to use their database to communicate with Salesforce. The company realized that marketing automation is the way of the future, and after encouragement from the CEO to “segment the database,” they chose Pardot.

SALESFORCE SOLUTION:
Elegran customized Salesforce and thought about the entire sales cycle in terms of the buyer journey. They broke their entire customer database into four different categories. As a result, they also built out Engagement Studio, campaigns, and different sales cycles and actions built around those segments.

RESULTS:
$400M in gross sales over each of the past 2 years
7X increase in productivity per agent
Travelers want seamless experiences when they’re on the move. Using the power of AI, companies in the travel and transportation industry create personalized guest experiences at every touchpoint and connect guests to the right offer at the right time.
“Using Einstein Prediction Builder in our marketing campaigns allows us to do personalized, 1:1 marketing.”

MIGUEL PARDO GIL-ALBERDI
CHIEF COMMERCIAL OFFICER
COMPANY OVERVIEW:
Trasmediterránea, part of the Armas Group, is Spain’s largest shipping company. TrasMed manages 40 ships that carry over 5 million passengers every year. The company connects passengers from Spain to the Balearic Islands, the Canary Islands, and North Africa.

BUSINESS CHALLENGE:
With over 70,000,000 rows of passenger information, Trasmediterránea wanted to see if there was a correlation between a customer’s profile and travel frequency. They sought to develop a new customer loyalty strategy based on the likelihood of each passenger being a frequent traveler. Finally, there was an opportunity to advance the company’s marketing campaigns and achieve a deeper understanding of the conversion funnel from new customer to frequent traveler.

SALESFORCE SOLUTION:
Einstein Prediction Builder uses passenger account information (9+ attributes) as the main formula objective to determine loyal customers (in other words, frequent travelers). From there, TrasMed uses Marketing Cloud to segment customers based on this prediction and apply different actions for each segment.

RESULTS:
5M
trips analyzed in Prediction Builder pilot
With Einstein Prediction Builder, you can predict outcomes for every function or industry. Any Salesforce admin can create custom predictions with just a few clicks, using a simple wizard. For example, you'll have insight into how likely a customer is to renew, or which invoice will not be paid in time.

Einstein Prediction Builder uses machine learning to analyze past data and predict what will happen in the future, taking a very automated approach. No need for a PhD in data science. Einstein does all the feature engineering, model building, model selection, and deployment for you. Pretty cool, huh?

SEE IT IN ACTION >
SEE IT HANDS-ON >