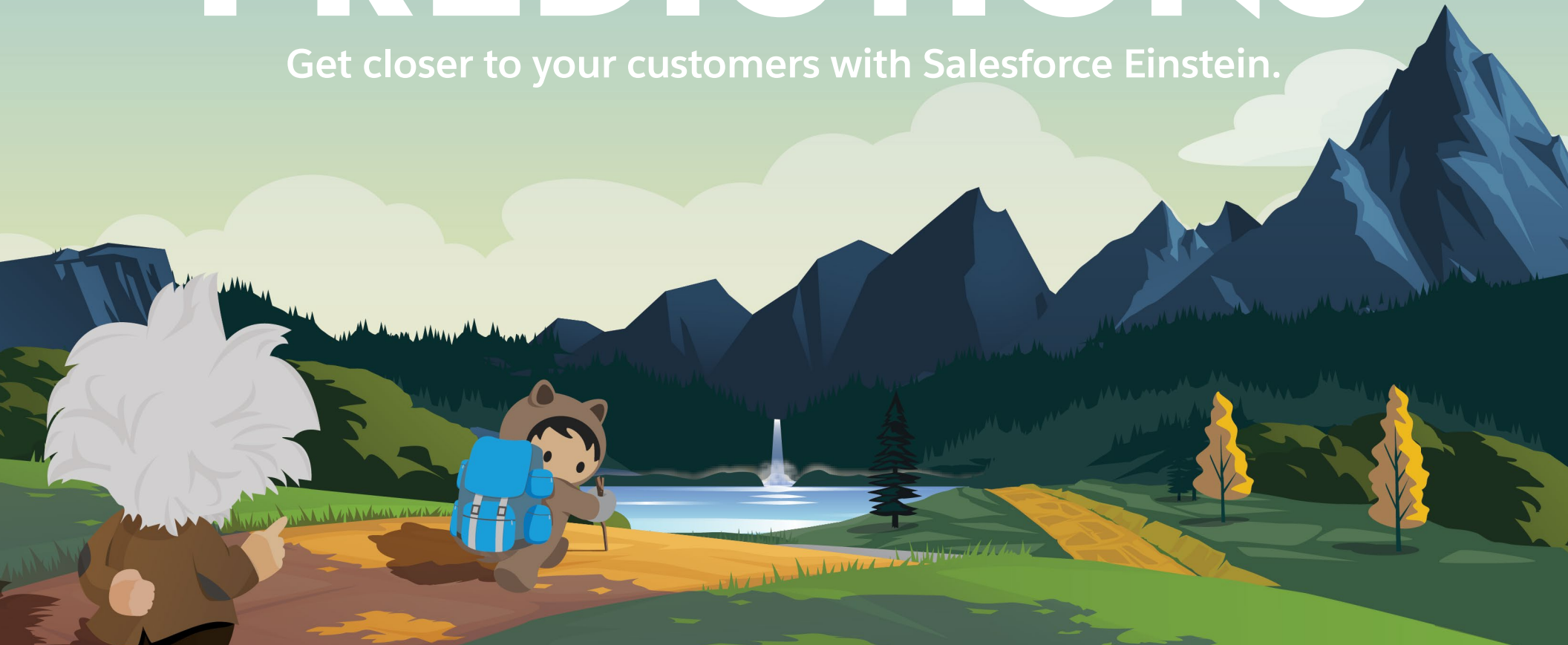


THE BIG BOOK of CUSTOMER PREDICTIONS

Get closer to your customers with Salesforce Einstein.



Contents

Introducing Salesforce Einstein	3
Chapter 1: Predictions for Sales	5
Chapter 2: Predictions for Service	9
Chapter 3: Predictions for Marketing	13
Chapter 4: Predictions for Commerce	17
Chapter 5: Predictions for HR, Finance, and IT	20
Chapter 6: Smarter Apps for Every Industry	24
Getting Started: What Will You Predict?	30



Introducing Salesforce Einstein

Predictions for CRM? Meet Salesforce Einstein.

Einstein is artificial intelligence (AI) for CRM – it learns from all your customer data to deliver predictions and recommendations, in context. Einstein automatically discovers relevant insights, predicts future outcomes, recommends best next steps, and even automates tasks, all without a data scientist.

Einstein makes every Salesforce app smarter with out-of-the-box predictions for every user type, such as scoring leads for sales, recommending answers to customer questions for service, detecting your brand on social media for marketing, and more.

Einstein is far more than its out-of-the-box features: It's built right into the Salesforce Platform. It enables every admin or developer to build AI-powered apps – using clicks or code. Read on to learn all the ways you can use predictions to get closer to your customers.

What Is a Prediction?

A prediction is a forward-looking estimate based on historical data. Today, businesses are using AI and machine learning to generate predictions and embed those in their business workflows. Some examples of prediction types that businesses are using 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.

More Predictions with *my*Einstein

With *my*Einstein, customers can build AI-powered apps faster using:

- **Einstein Prediction Builder:*** a simple wizard that allows admins to create custom predictions on standard or custom objects in Salesforce with clicks, not code.
- **Einstein Vision and Language:** a set of APIs that allow every developer to build smarter apps leveraging their unstructured image and text data.
- **Einstein Bots:** a simple point-and-click interface that enables every customer to build a customized service chatbot trained on their CRM data, natural language processing (NLP), and customer and agent feedback.
- **Einstein Discovery:** AI-powered smart data discovery that uses machine learning to help business analysts find key insights hidden in their data, automatically explain the insights in simple language, and then push these insights into Salesforce CRM for everyone to benefit from.



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



The illustration shows a brown bear wearing a grey t-shirt, standing on a dirt path in a grassy field. The bear is holding a map titled "TRAIL MAP" and looking up at a floating card that displays an Einstein Score of 95. The card also lists top positive and negative factors for a lead and includes "Call Now" and "Send Email" buttons.

95 Einstein Score

Top Positive Factors

Industry is **Telecommunications**
Phone is **Valid**
Web activity is **High**

Top Negative Factors

Title is **Associate**
Description is **Missing a Value**

Call Now Send Email

* Product is in pilot.

salesforce.com | 6

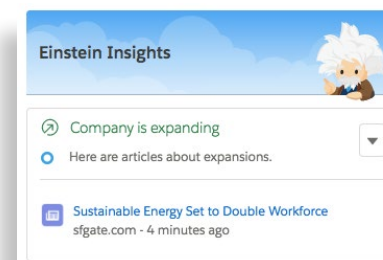


Einstein Opportunity and Account Insights

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.

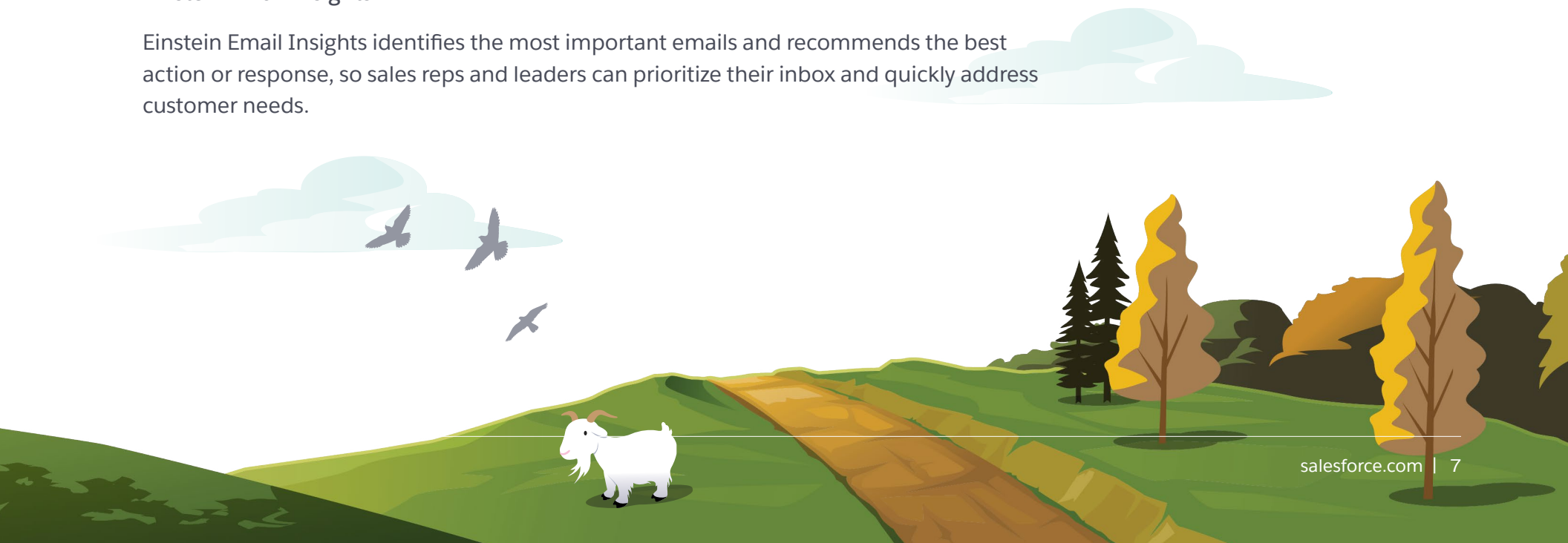
Einstein Activity Capture and Automated Contacts

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

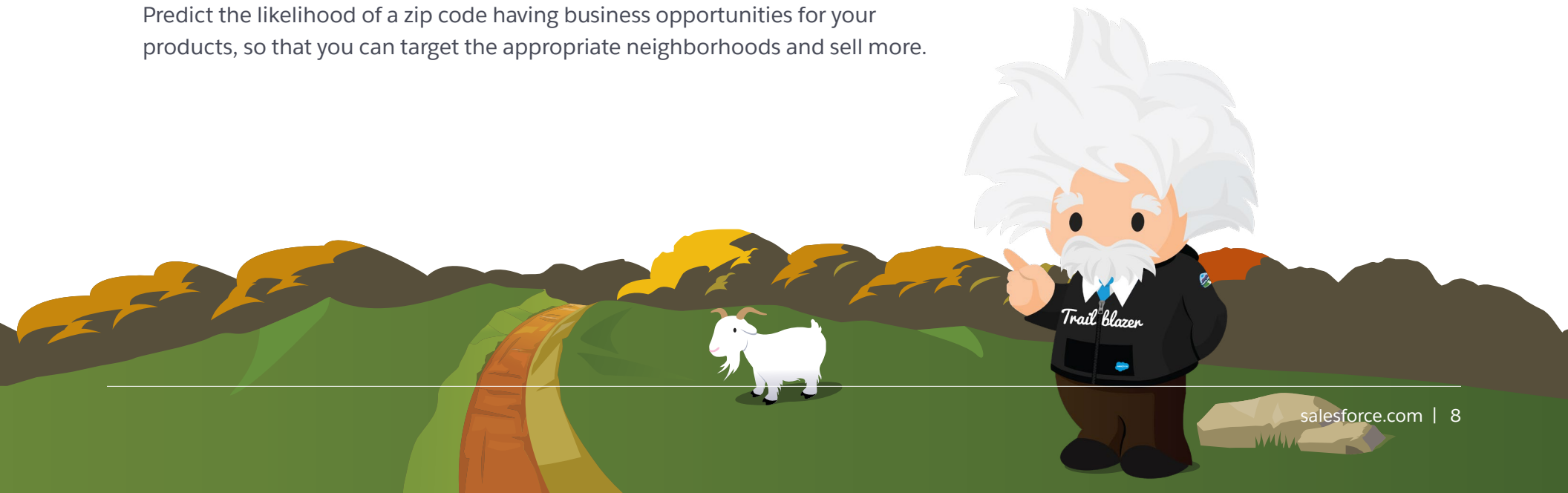
Predict the likelihood of a customer or prospect purchasing a particular product, so that you can prioritize the products you target for your customer and sell more.

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

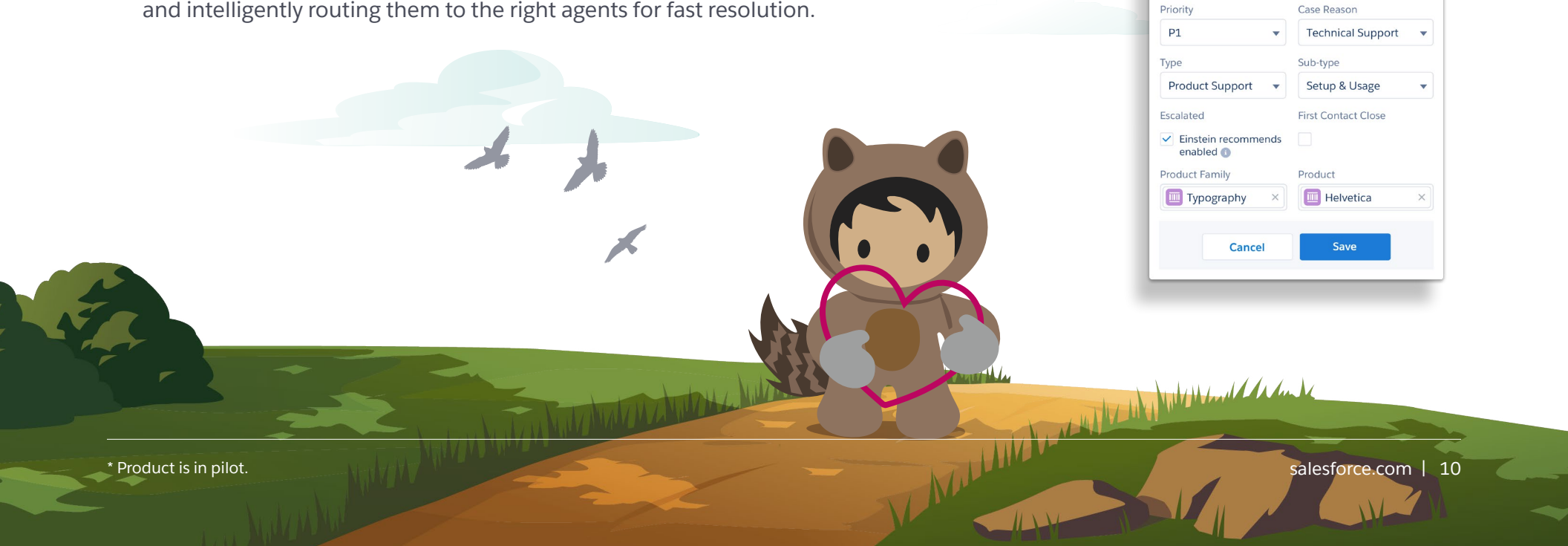
Easily build, train, and deploy custom bots – trained on your CRM data – to augment business processes, empower your employees, and delight your customers. With Einstein Bots you can automatically resolve routine customer requests or collect and qualify customer information for seamless agent handoff.

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



Case Detail

 Recommendations Applied

Case Number 00012487	Status Working
Case Origin Email	Owner Amber Cann
Priority P1	Case Reason Technical Support
Type Product Support	Sub-type Setup & Usage
Escalated <input checked="" type="checkbox"/> Einstein recommends enabled	First Contact Close <input type="checkbox"/>
Product Family Typography	Product Helvetica

Cancel Save

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

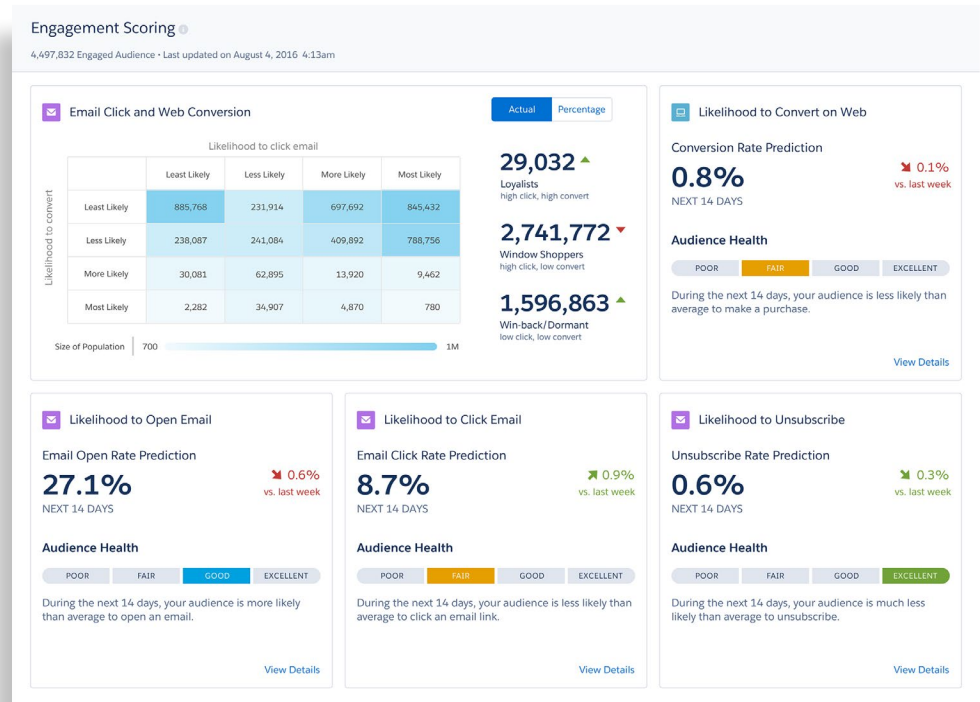


Einstein Vision for Social Studio

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

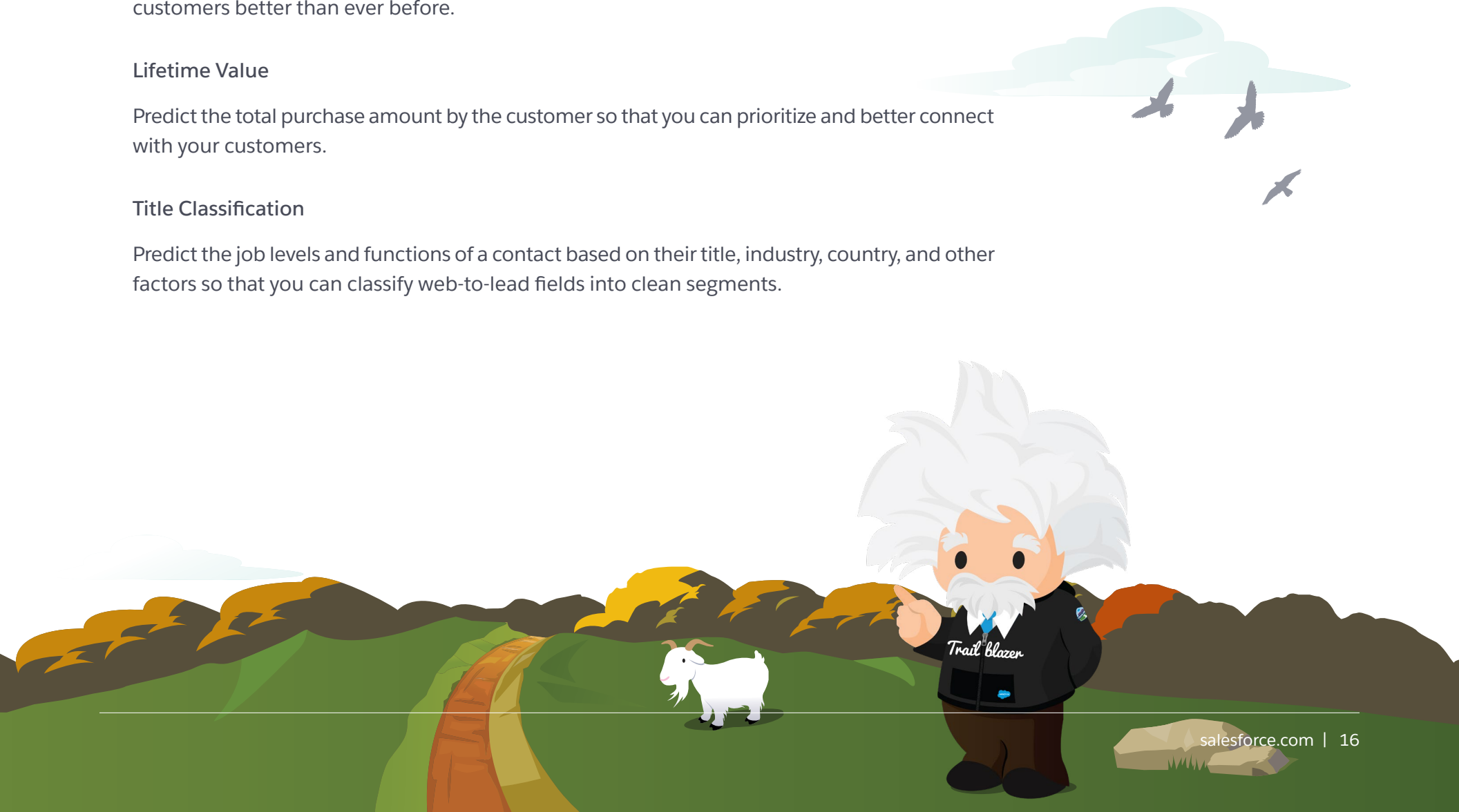
Custom predictions enable marketers to use the power of AI to deliver personalized experiences, incorporating the organizational needs of businesses and the expectations of individual customers. Predictions can drive customized engagements that connect with customers better than ever before.

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

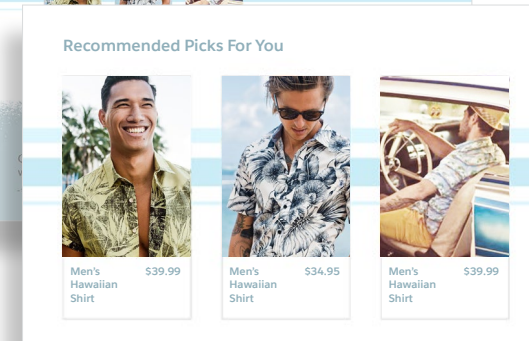
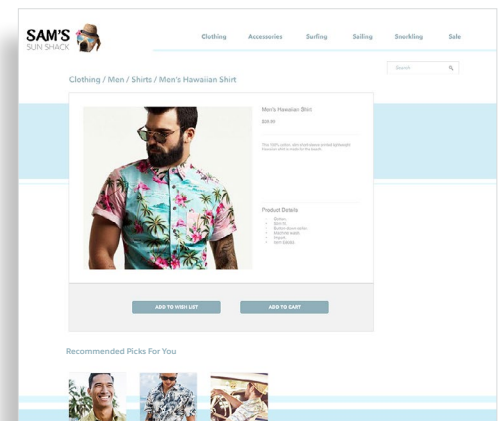
Predict the search terms that need to be added to search dictionaries to ensure that shoppers always see the most relevant results onsite.

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 **myEinstein**

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.



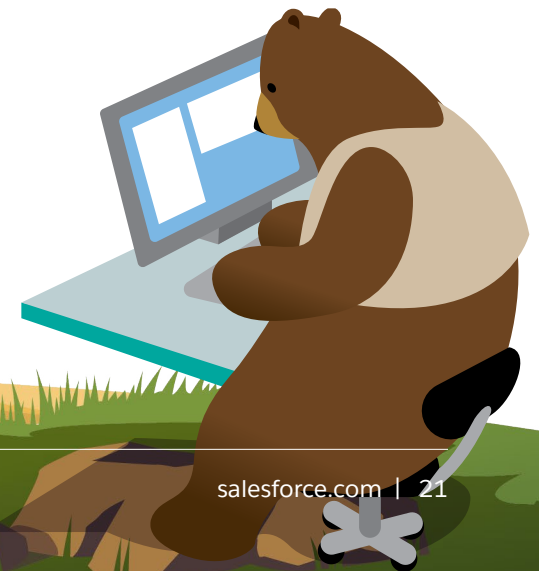
PREDICTIONS FOR HUMAN RESOURCES

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

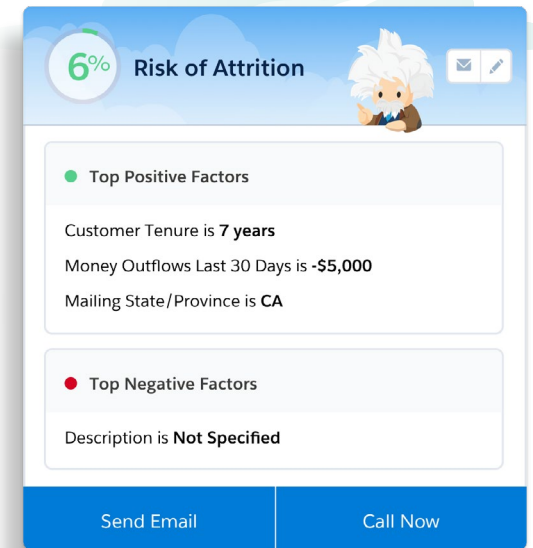
Predict the likelihood of an employee leaving the company so that you can re-engage the employee and prevent regrettable attrition.

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.

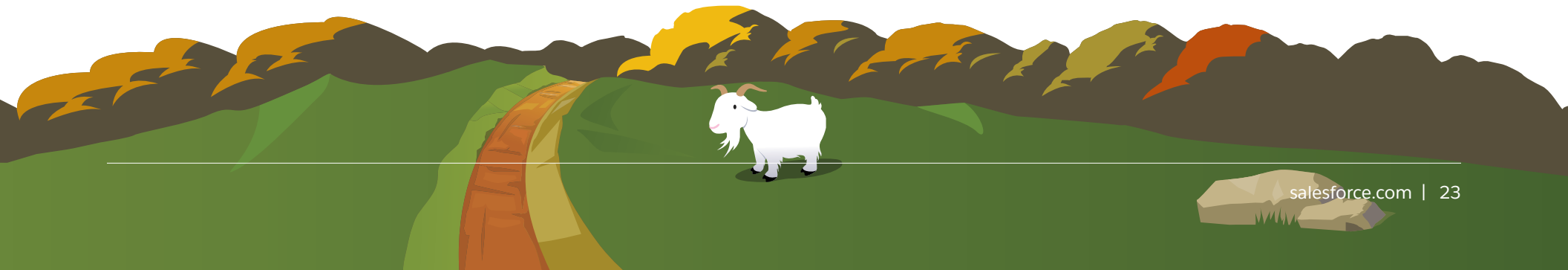
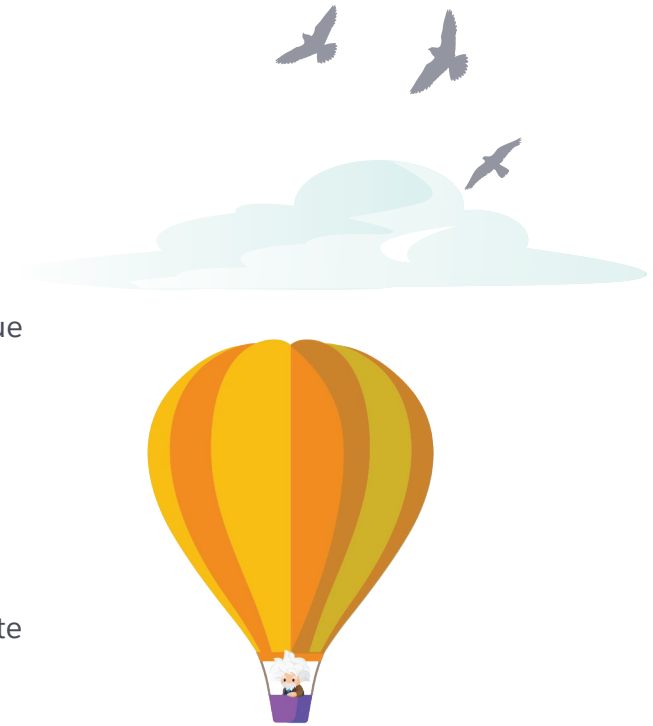
PREDICTIONS FOR IT

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 **myEinstein**

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

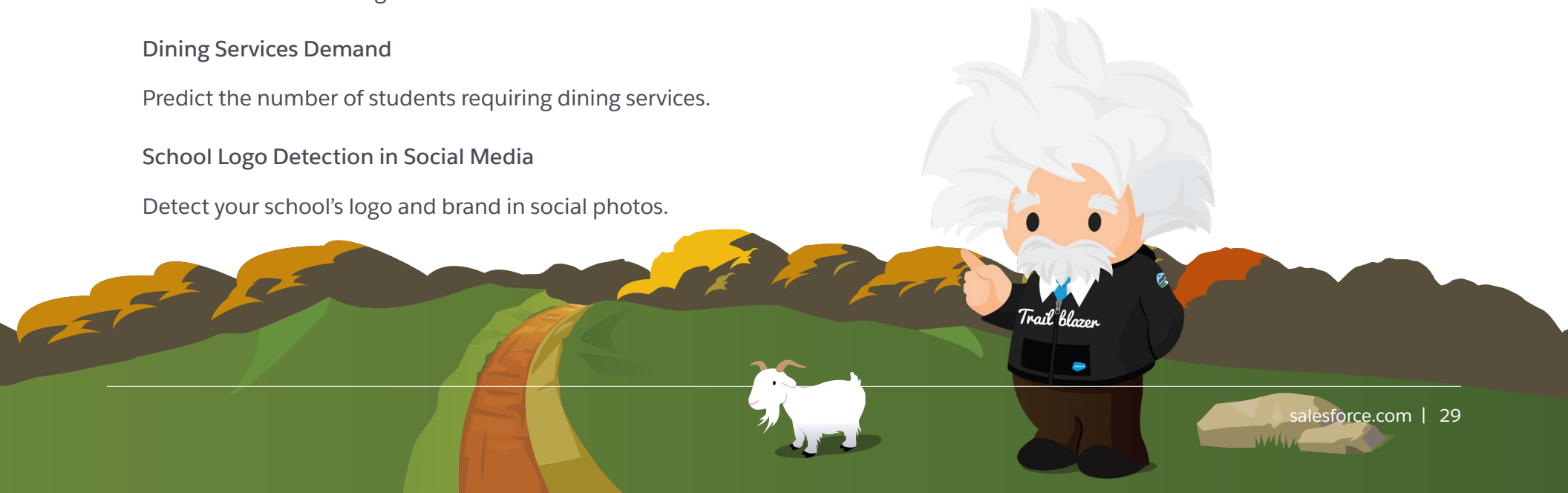
Recommend counseling services based on student behavior.

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.



Getting Started: What Will You Predict?

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

With Salesforce Einstein you can rapidly progress from prototyping, to pilot, to scale. 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, then 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 in Salesforce means more options for 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, listviews, 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

