

Learn. Network. Grow. MParDreamin' 2022

Using Einstein Al within Account Engagement

Jeffrey Stollenwerk

Lead Solution Engineer, Salesforce





Special Thanks To Our Sponsors





Platinum

DESELECT Stensul atray.io

Gold

FormAssembly



THE SPOT FOR PARDOT by SERCANTE

Silver











Einstein Al Within Account Engagement

- Evolution of Einstein
- Competitive Advantages
- Expected Benefits
- What You'll Need
- How Each Feature Works
- Einstein Life Hacks



Evolution of Einstein

2016	—— Salesforce Introduces Einstein
2017	
2018	
2019	Einstein for Account Engagement launch Lead Score, Behavior Score, Campaign Insights
2020	Behavior Scoring Dashboard Data-Driven Attribution
2021	———— Send Time Optimization ———— Key Account Identification
2022	Engagement Frequency



Einstein Al for Account Engagement

Growing set of **TURN-KEY** Al-powered features across **MULTIPLE OBJECTS** that **CONTINUOUSLY** monitor & analyze data

from ACCOUNT ENGAGEMENT <u>& SALESFORCE</u>

for MARKETING & SALES INSIGHTS



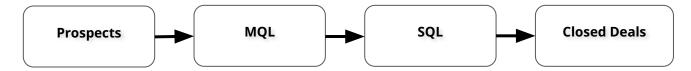
Our Advantage: Easily Leverage

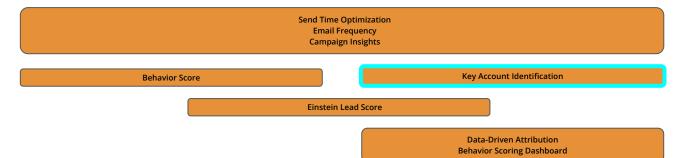
salesforce

Leverage data from every stage in the Customer Lifecycle

sales*f*orce

Data





Our Advantage: Easily Leverage

salesforce

Leverage Data Stored in Salesforce Custom Objects

The Einstein Key Accounts Identification model scans for signals on fields from objects such as the ones listed here.

sales*f*orce

Data

Account Contact Currency Type Event Lead Opportunity Opportunity Contact Role Opportunity Line Item Pardot Prospects Pardot Visitor Activities Pricebook Entry Task

Key Account Identification

The Luxuries of using Einstein Al

- Turn on the features with the flip of a switch
- Automates time-consuming tasks
- Eliminates annoying guesswork
- Brings the insights to you
- More accurate/insightful reporting
- Includes context within insights



What You'll Need



Account Engagement - Advanced or Premium Salesforce Lightning - Enterprise, Performance, or Unlimited Ample data Data Integrity \checkmark



EINSTEIN MENU

Marketing Optimization	Marketing & Sales Prioritization	Marketing Insights
Send Time Optimization	Lead Scoring	Campaign Insights
Engagement Frequency	Behavior Scoring	Data-Driven Attribution
	Key Accounts Identification	Behavior Scoring Dashboard



Einstein Send Time Optimization

Send emails at the right time for each recipient

Maximize Opens & Engagement

Einstein analyzes each recipient's historical engagements and sends at the optimal time for each prospect

Beat Your Inbox Competition

Be above the fold in the email inbox to capture the attention of your subscribers

Pro Tip:

Use this to transcend time zones & email throttling limits

Einstein can optimize email send times for individual prospects. Select a time frame for sending emails. Tell Me More * Start Date * Label.Time 11/04/2022 12:00 PM () * Send Emails Within 4 hours Enter a number between 3 and 168. ()								
Einstein can optimize email send times for individual prospects. Select a time frame for sending emails. Tell Me More *Start Date *Label.Time 11/04/2022 *Send Emails Within • Send Emails Within • A P hours Enter a number between 3 and 168. The email is scheduled based on your timezone: Oct 27, 2022 1:22 AM PDT	nd T	ime						
Select a time frame for sending emails. Tell Me More * Start Date * Label.Time 11/04/2022 * Send Emails Within 4 hours Enter a number between 3 and 168. The email is scheduled based on your timezone: Oct 27, 2022 1:22 AM PDT	Einste	in Optim	ized	Send	Now	Send Lat	ter	
* Send Emails Within • 4 • hours Enter a number between 3 and 168. • The email is scheduled based on your timezone: Oct 27, 2022 1:22 AM PDT		Select a	time fr				ell Me More	pects.
 4 hours Enter a number between 3 and 168. The email is scheduled based on your timezone: Oct 27, 2022 1:22 AM PDT 		11/04	4/2022		苗		12:00 PM	0
Enter a number between 3 and 168. ⁽¹⁾ The email is scheduled based on your timezone: Oct 27, 2022 1:22 AM PDT		* Send E	mails W	ithin				
The email is scheduled based on your timezone: Oct 27, 2022 1:22 AM PDT		0	4	•	hours			
AM PDT		Enter a r	umber	between	n 3 and 1	68. 🚺		
The sent by Nov 4, 2022 4:00 PM PDT				neduled	based o	on your tim	ezone: Oct 27, 2	2022 1:22
		T En	nail will	be sent	t by Nov	4, 2022 4:	00 PM PDT 🚯	

Einstein Engagement Frequency



Identify the optimal send frequency for marketing emails

	iearch		*• • • •	; \$ \$ \$
Automations Pardot Email Conten	t Pardot Reports Reports V Pardot Settings	sectificity Manine A		ANNIN JUNGS
ion Nurture 🗸 🚥	1		Select Copy	► Start
ACTIVITY			Q. Search this program	
	Start Internal Test List			
	American real car			
	← PROSPECT DEFAULT Can FIELD	cel		
	FIELD			
	Prospect default field			
	Einstein Engagement Frequency ×	•		
	is	~		
	✓ Select a value	-		
	On Target Saturated			
	Undersaturated			
	Evaluate when?			
	 Immediately 			
	⊖ Wait			

- Al-driven engagement frequency status is stored in a prospect field based on customer email behavior
- Uses engagements with list email sends, sends through Engagement Studio & "Sales Emails & Alerts"
- Pro tip: Create a dynamic suppression list of oversaturated prospects to easily avoid email fatigue

			🛛 🖬 🚓 ? 🌣 🦧 🤠
	* ►). * ►). * ►) • 107 / መገርታ /	. * <u>b</u>], * <u>b</u>], * ሙገ መታወ ገ የታታወ	Landing Pages ✓ Pardot Settings More ♥
Company Omega, Inc. Account Name No account	순 🗢 🖬 e.com 🗹	Prospect Activities Any Type ACTIVITY Form: Demo Request Form: White Paper Download	Any Category ✓ TYPE ✓ SCORE DATE / TIME Success 50 May 6, 2022 9:05 AM Success 50 Oct 26, 2022 2:59 PM
Mailability Status 🖾 Mailable	unique to this prospect.	Form: Contact Us Form: Contact Us	Success 50 Jul 25, 2022 3:44 AM Success 50 Jul 22, 2022 9:17 PM Success 50 Apr 12, 2022 4:14 AM ow Rows: 5
Opted Out False Do Not Email False Soft Bounce Detected No Hard Bounce Detected No		External Activities ACTIVITY No external activities to show	DATE / TIME -
	Home Analytics Campaigns Ron Abelin Overview Lists Profile Activities Contents Name Ron Abelin Email rabelin@example Company Omega, Inc. Account Name No account Source Campaign Google Adwords Mailability Status Status Mailable Email Uniqueness Email address is a Opted Out False Do Not Email False Soft Bounce Detected No	Overview Lists Profile Activities Audits Lifecycle Opportunities Relate Overview Lists Profile Activities Audits Lifecycle Opportunities Relate Contents Name Ron Abelin	Home Analytics Campaigns Prospects Automations Content Email Templates Email Content Overview Lists Profile Activities Audits Lifecycle Opportunities Related Objects Overview Lists Profile Activities Audits Lifecycle Opportunities Related Objects Contents Prospect Activities Name Ron Abelin Arry Type Email rabelin@example.com Activities Company Omega, Inc. Import Contact Us Source Campaign Google Adwords Mailability Status Mailable Email Uniqueness Email address is unique to this prospect. Opted Out ① Opted Out ① False External Activities Do Not Email ① False ACTIVITY Sort Bounce Detected No





Optimization Do More With Less! Send Time Optimization Engagement rates Helps you send the right message at the right time DOING Engagement Frequency MORE Opt-out rates Identifies the optimal email volume for prospects - Flip of a switch **WITH** LESS - Pick the send window - Eliminates guesswork - All automated





Optimization	Do More With Less!
Send Time Optimization Engagement Frequency	of) my team 15-30 minutes of time in a day segmenting leads." Zino Angelides, Elegran



EINSTEIN MENU

Marketing Optimization	Marketing & Sales Prioritization	Marketing Insights
Send Time Optimization	Lead Scoring	Campaign Insights
Engagement Frequency	Behavior Scoring	Data-Driven Attribution
	Key Accounts Identification	Behavior Scoring Dashboard



Marketing & Sales

Prioritization

Lead Scoring

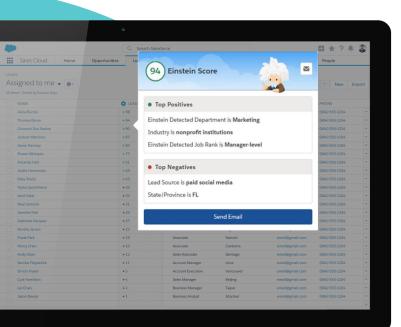
Behavior Scoring

Key Accounts Identification

Einstein Lead Scoring



Target leads who are likely to convert



Prioritized Lead Lists

Focus on leads that fit your ideal customer profile

Smart Workflows

Automatically assign tasks to help sales win

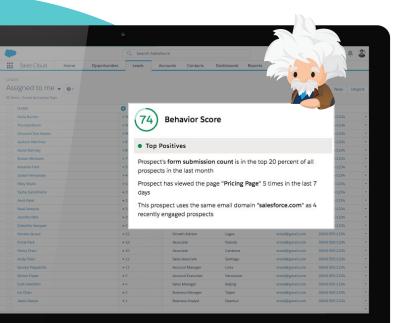
Predictive Insights

See which fields drive positive or negative fit scores

Einstein Behavior Scoring



Know which prospects are ready to buy



Continuous Machine Learning

Unique scoring models for your organization that automatically adjust as new patterns surface

Enhanced Key Factors

Surface key factors that influence scores

Improve Prospect Targeting

Use Einstein Behavior Scores to pass leads to Sales, in Engagement Studio steps and Automations

Rules-Based Scoring vs. Einstein Scoring

results are not always accurate

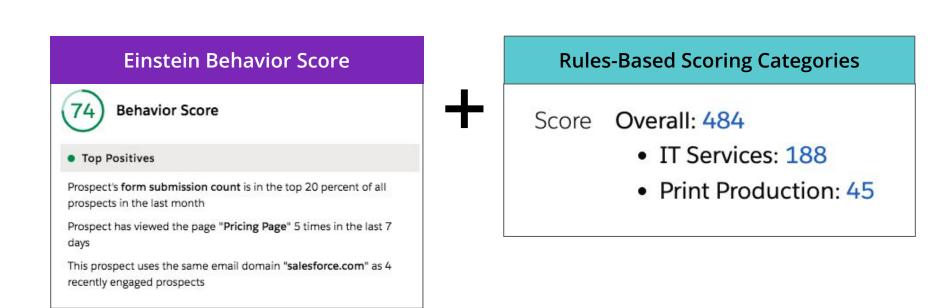
Rules-Based Scoring	Einstein Scoring
There is no "silver bullet"	Takes away guesswork
There is a lot of guesswork involved in deciding what is	Einstein uses patterns in your historical data to
valuable to conversion and deciding weighting	automatically determine prioritization
Lacking context for sales reps	Provides valuable insights
No details to explain why Score/Grade is high/low	Einstein provides normalized scores (0-100) and the
and scores can get top-heavy	top positives & negatives that influenced each score
Time-Consuming	Automated & Continuous
Customizing, maintaining, & often times rebuilding	Einstein is automatically & continuously analyzing your data
your models can be a daunting task and	to give Marketing time back in their day while resulting in

more accurate & up-to-date prioritization for Sales

Some Customers Use Both



They are not mutually exclusive!



Einstein Key Account Identification



Surface Account potential with AI



Based on 68 similar accounts who became top spenders from December 2019 through December 2020.

Prediction Factors

Similar Account Profile Traits

- Industry is Automotive
- Company Size is 10,000+

Similar Account Engagement Traits

- 5 prospects filled out "Get a Demo" form last quarter
- 4 prospects attending "Product Demo" webinar in the past quarter

Account Prioritization

Valuable for ABM target identification & list creation

Asses Fit & Intent to Buy

Uses historical Account, Opportunity, & Engagement Data

Uses Normalized Data

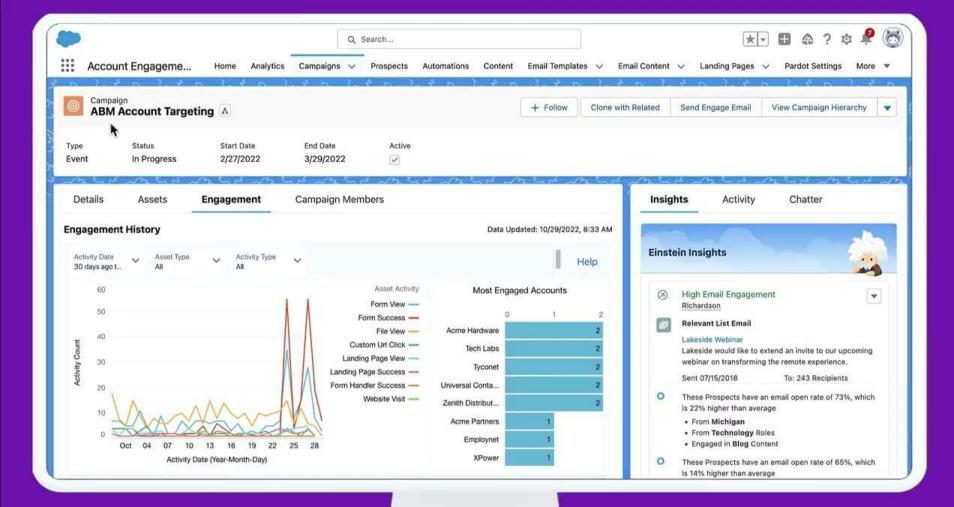
Pulls attributes from Salesforce's proprietary data warehouse which can also be pushed to fields

What Else Can You Do with Einstein Scores?

More than just a Salesforce Lightning component

- Use as criteria in your automations
- Control dynamic content variations
- Visible on prospect records and list views
- Include in Salesforce flows, reports, or list views
- Data-driven content strategy

	Last Day	Last 7 Day	/s Last 3	0 Days Last 9	0 Days	Last 365 Days	AILTI	me Periods			
Influence By Activity			Influence b	oy Asset							
Most influential positive and nega	itive activities in your Einste	sin model.	Select a row on t	he Activity graph to see whit	ch assets affec	t a Behavior Score.					
Form Submissions		0.49	Subm	itted "Product Demo Form	1*						0.5
Webinar Attendance		0.4	Sut	omitted "Contact Me Form	17				0.42		
File Views		0.31	Attende	d "Product Demo Webina	e 📃			0.37			
Video Views		0.25	V9	ewed "Product Pricing File	e		0.28				
Webinar Registrations		0.23		d "New Solutions Webina			0.25				
Email Clicks		0.18		Webinar Registration Form		0.2	2				
Page Views		0.17		ew Product Whitepaper F	-	0.17					
Email Opens		0.14	Attended *E	lecome an Expert Webina	r"	0.15					
Paid Search Ad Clicks	_	0.09									
Email unsubscribe page Email Bounces	-0.43										
Connected Prospect	15	Company	~	Campaign All	~	Industry All	~	Behavior Score	'e Bucket	~	Prospe
		All		All	~	All	~	All		~	
Name	ProspectType		core Tit	All	~	All	~	All	у	~	
		All	core Tit	All	~	All Company Universe Design	~	All	y ering	~	
Name Rosa Abelin	ProspectType	All	core Tit 41 VP 14 VP	All Consulting	~	All		All Industr	y rring ment	~	
Name Rosa Abelin Jeremie Alonso	ProspectType Lead Lead	All	core Titt 41 VP 14 VP 42 Pre	All Consulting Consulting	×	All Company Universe Design Clarity Corporation		All Industr Enginee Governm	y Hring ment ment	~	
Name Rosa Abelin Jeremie Alonso Tim Arlint	ProspectType Lead Lead Lead	All	core Tit 41 VP 14 VP 42 Pre 43 VP	All Consulting Sident CEO	~	All Company Universe Design Clarity Corporation Glacier Wholesalers In		All Industr Enginee Governm Governm	y ring ment ment ing	~	
Name Rosa Abelin Jeremie Alonso Tim Arlint Jordan Amy	ProspectType Lead Lead Lead Lead	All	core Tit 41 VP 14 VP 42 Pre 43 VP	All Consulting Consulting sident CEO Purchasing ector of Finance	~	All Company Universe Design Clarity Corporation Glacier Wholesalers In Lee Enterprises Inc		All Industr Enginee Governm Governm Consult	y ment ment ing ment	~	
Name Rosa Abelin Jeremie Alonso Tim Arlint Jordan Amy Debra Boehme	ProspectType Lead Lead Lead Lead Lead Lead Lead Lea	All	Core Tit 41 VP 14 VP 42 Pre 43 VP 48 Din 48 CF	All Consulting Consulting sident CEO Purchasing ector of Finance	~	All Company Universe Design Clarity Corporation Glacier Wholesalers In Lee Enterprises Inc Air Controls Co Inc	nc	All Industr Enginee Govern Consulti Govern	y ment ment ing ment ortation	~	
Name Rosa Abelin Jeremie Alonso Tim Arlint Jordan Amy Debra Boehme Guy Bohan	ProspectType Lead Lead Lead Lead Lead Lead Lead	All	Core Titl 41 VP 14 VP 42 Pre 43 VP 44 Din 48 CFI 42 VP	All Consulting Consulting sident CEO Purchasing ector of Finance D	~	All Company Universe Design Clarity Corporation Glacier Wholesaters In Lee Enterprises Inc. Air Controls Co Inc. StorSafe, Inc.	nc	All Industr Enginee Governn Consulti Governn Transpo	y ment ment ing ment ortation ure	~	
Name Rosa Abelin Jaremie Alonso Tim Arlint Jardan Amy Debra Boehme Guy Bohan Lea Bolivar	ProspectType Lead Lead Lead Lead Lead Lead Lead Lea	All	Core Titl 41 VP 14 VP 42 Pre 43 VP 44 Din 48 Din 44 VP 48 SVI	All Consulting Consulting sident CEO Purchasing ector of Finance D Operations	~	All Company Universe Design Clarity Corporation Glacier Wholesalers In Lee Enterprises Inc Air Controls Co Inc StorSafe, Inc. Safety Sign & Supply	nc	All Industr Consulti Consulti Consulti Consulti Agriculture	y ment ment ing ment ortation sure ing	~	





EINSTEIN MENU

Marketing Optimization	Marketing & Sales Prioritization	Marketing Insights
Send Time Optimization	Lead Scoring	Campaign Insights
Engagement Frequency	Behavior Scoring	Data-Driven Attribution
	Key Accounts Identification	Behavior Scoring Dashboard

Marketing

Campaign Insights

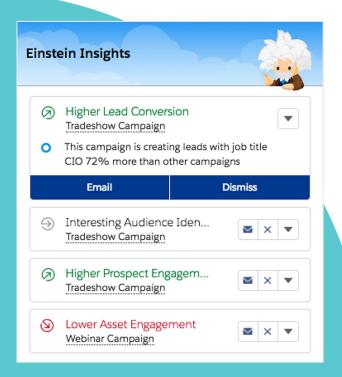
Data-Driven Attribution

Behavior Scoring Dashboard

Einstein Campaign Insights



Unearth hidden campaign insights



Gain Performance Insights

Understand key factors that drive global and campaign level engagement

Serves Content Engagement Insights

Will tell you if content is getting significantly high or low levels of engagement with specific audiences

Optimize Target Audiences

Adjust the audience of your campaigns based on the highest performing assets

Einstein Attribution

Data-Driven Model to measure Impact

OOTB AI Data-Driven Model

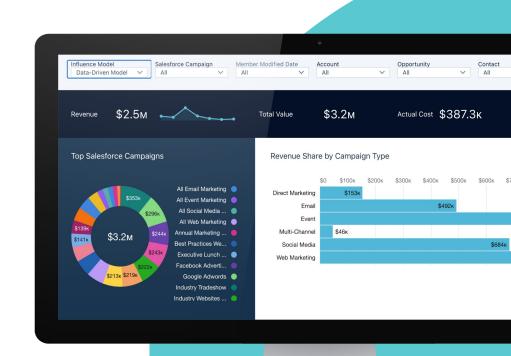
Accurately reflect Marketing's revenue influence

Auto-Captures Buying Committee

No longer requires Sales Reps to manually populate Opportunity Contact Roles

Accurate Campaign Weighting

Based on the number of meaningful engagements with marketing content for each Campaign



Behavior Scoring Dashboard

Discover buying behaviors with key prospect data from Einstein

		Last Day	Last 7 Days	Last 30 Days	Last 90 Days	Last 365 Days	IIA	Time Periods
ence By Activity	/ gative activities in your Einstein	model.		ence by Asset row on the Activity graph to see which a	assets affect a Behavior Score.			
Form S Unlinked Op E H We	URL Clicks ubmissions portunities imail Clicks form Views ubsite Visits e Searches 0.52	0.14 0.095 8.7m -0.071	0.9	Viewed page 'Cookie Monster scare Ope Open Viewed page Pumpkin spice drink c V	ened email 'Miss you already' ed email 'Hate to see you go' Viewed page 'Wrighty then!'		0.11	0.33 0.32 0.21 0.21 0.19
ected Prospec	ts	Comp Al	ary	Campaign Al		Industry All		Score Range All
ected Prospec	ts Lead/Contact	Comp All Behavior Score	any Job Title	Campaign Al	any		Campaign	AI
		All		All		All		AI
ige	Lead/Contact	All	Job Title	Al Comp tative II Innoty	pe	All Industry	Annual Ma	AI
lge usche	Lead/Contact Contact	All	Job Title 56 Account Represent	All Comp tative II Innoty II Carrid	pe	All Industry Apparel	Annual Ma Annual Ma	All Intesting Plan
ige lusche riner	Lead/Contact Contact Contact	All	Job Title 56 Account Represent 56 Research Assistant	Al Comp tative II Innoty II Carrid Acree	pe lo Partners	All Industry Apparel Apparel	Annual Ma Annual Ma	All inketing Plan unketing Plan unketing Plan
dge Lusche ther Bowden	Lead/Contact Contact Contact Contact	All	Job Title 56 Account Represent 56 Research Assistant 26 Account Executive	Al Comp tative II Innoty II Carnid Acme ant Tech L	pe lo Partners	All Industry Apparel Technology	Annual Ma Annual Ma Annual Ma	All Infecting Plan Infecting Plan Infecting Plan 8 - AMER
dige Jusche Rowden Pearson	Lead/Contact Contact Contact Contact Contact	All	Job Title 56 Account Represent 56 Research Assistant 26 Account Executive 82 Senior Vice Preside	All Comp tative II Innoty II Carrid Acme ant Tech L South	pe lo Partners abs	All Industry Apparel Apparel Technology Technology	Annual Ma Annual Ma Annual Ma Retargeting	All Infletting Plan Infletting Plan Infletting Plan g - AMER farketing
dge Ausche Rowden Yearson Nastasio	Lead/Contact Contact Contact Contact Contact Contact Contact	All	Job Title 56 Account Represent 56 Research Assistant 26 Account Executive 82 Senior Vice Preside 73 Owner	Al Comp tative II Innoty II Camid Acme ant Tech L South Valley	pe lo Partners abs ern Solutions	All Industry Apparel Apparel Technology Technology Technology	Annual Ma Annual Ma Annual Ma Retargetinj All Email N Facebook A	All Infletting Plan Infletting Plan Infletting Plan g - AMER farketing
dge Jusche Bowden tearson wastasio Kendra	Lead/Contact Contact Contact Contact Contact Contact Contact	All	Job Title 56 Account Represent 56 Research Assistant 26 Account Executive 82 Senior Vice Preside 73 Owner 68 SVP, Sales	All Comp Innoty III Carried ont Carried on	ipe lo Partners abs ern Solutions Supply Inc.	All Industry Apparel Technology Technology Technology Manufacturing	Annual Ma Annual Ma Annual Ma Retargetin All Email M Facebook J Annual Ma	All Infacting Plan Infacting Plan Infacting Plan g - AMER Farketing Advertising
dge Jusche Bowden tearson astataio Kendra hillips	Lead/Contact Contact Contact Contact Contact Contact Contact Contact Contact	All	Job Title S6 Account Represent S6 Research Assistant S6 Account Executive S6 SviP, Sales 20 -	Al Comp comp lative II dinovi II Cavid Acree one Tach L South Cavity Gener Morpe	pe lo Partners abs em Solutions Supply Inc. al Utilities	All Industry Apparel Apparel Technology Technology Technology Manufacturing Communications	Annual Ma Annual Ma Annual Ma Retargetin All Email M Facebook J Annual Ma Annual Ma	Al rketing Plan rketing Plan g - AMER Advertising rketing Plan
dge Ausche Anter Bowden Verson Wendra Kendra Hillips sxter	Lead/Contact Contact Contact Contact Contact Contact Contact Contact Contact	All	Job Title S6 Account Represent S6 Research Assistant S6 Account Executive S8 Senior Vice Preside S9 SVP, Sales 20 - 32 Account Executive	Al Comp tative II Snoop II Carrid Acres II Carrid II Car	pe Pertnes abs em Solutions Supply Inc. al Utilities on Brothers	All Industry Apparel Apparel Technology Technology Manufacturing Communications Retail	Annual Ma Annual Ma Annual Ma Retargetinj All Email N Facebook J Annual Ma Annual Ma Annual Ma	Al rhetting Plan rhetting Plan rhetting Plan g - AMER farketing Advertising rhetting Plan
dge Ausche Ausche Bewden Wendre Kendre Hillips Auster Bauter	Lead/Contact Contact Contact Contact Contact Contact Contact Contact Contact Contact	All	Job Title S6 Account Represent S6 Research Assistant 26 Account Executive 82 Senior Vice Preside 73 Owner 68 SVP, Sales 20 - 32 Account Executive 29 -	Al Comp astre II droxy II Carrier are Terch L South Gener Mopp Lurier Ansco	pe Pertners abs em Solutions Supply Inc. al Ublifies an Brothers sel Services	All Industry Apparel Apparel Apparel Technology Technology Technology Manufacturing Communications Retail Financial Services	Annual Ma Annual Ma Annual Ma Retargetin All Email M Facebook J Annual Ma Annual Ma Annual Ma Annual Ma	Al riteting Plan riteting Plan riteting Plan g - AMER fariteting Plan riteting Plan riteting Plan riteting Plan riteting Plan
nected Prospect oge dege deadhe Bondon Veano	Lead/Contact Contact Contact Contact Contact Contact Contact Contact Contact Contact Contact	All	Job Title 56 Account Represent 56 Research Assistant 26 Account Executive 82 Senior Vice Preside 73 Owner 68 SVP, Sales 20 - 32 Account Executive 29 - 48 VP, Supply Chain	All Comp table II Group table II Group II Carrid Acre on on Carrie Gene Gene Carrie Acaco Carrie Acaco Carrie Acaco Carrie Acaco Carrie Acaco Carrie	pe lo Partnes Abu Suppy Inc. Suppy Inc. Supp	All Industry Apperel Apperel Apperel Technology Technology Manufacturing Communications Retal Financial Services	Annual Ma Annual Ma Annual Ma Retargetinj All Email M Facebook J Annual Ma Annual Ma Annual Ma Annual Ma	Al relating Plan relating Plan a - AARB datekting Advertsing miketing Plan relating Plan relating Plan stomer Conference
kige Ausche Bowden Pearson Nantasio Kendra Hhilips Auster Baster Haster	Lead/Contact Contact Contact Contact Contact Contact Contact Contact Contact Contact Contact Contact Contact Contact Contact Contact Contact Contact	All	Job Title 56 Account Represent 56 Research Austant 56 Research Austant 56 Account Executive 52 Serior Vice Preside 50 Account Executive 50 - 51 Account Executive 50 - 52 Account Executive 54 VP, Supply Chain 100 President and CEO	All Comp table II Group table II Group II Carrid Acre on on Carrie Gene Gene Carrie Acaco Carrie Acaco Carrie Acaco Carrie Acaco Carrie Acaco Carrie	pe bo Partners Abb ern Sokulions Supply Inc. al Ublicies al Ublicies biototarn al Services Limited exist Supply Co. Technologies	All Industry Industry Apparel Apparel Technology Technology Technology Communications Retail Financial Services Retail Manufacturing	Annual Ma Annual Ma Annual Ma Retargetin All Email N Facebook J Annual Ma Annual Ma Annual Ma Annual Cu AdWords: I Annual Ma	Al And Antering Plan Ankeling Plan Ankeling Plan a "AMER Autorstring Autorstring Autorstring Plan Ankeling Plan Ankeling Plan Ankeling Plan Ankeling Plan Expenses Management Expenses Management

Understand Factors Driving Purchase Behavior

View the assets and activities driving Prospect Behavior scores

Discover New Engagement Patterns

Compare Pardot Prospect Scoring model with Einstein's to identify how prospects interact with your campaigns

View Influence by Different Time Buckets

See the Asset Types and specific Assets that have been most influential in various time periods





Optimization

Send Time Optimization

Helps to send the right message at the right time

Engagement Frequency

Identifies the optimal email volume for prospects



Prioritization

Lead Scoring

Helps sales prioritize their best-fit leads

Behavior Scoring

Identifies who is currently ready to buy

Key Accounts Identification

Identifies top-tier accounts

Insights

Campaign Insights

Learn what drives campaign performance

Attribution

Al-powered attribution modeling

Behavior Scoring Dashboard

Shows engagement activity influence on the Behavior Score



Thank you!

We appreciate your attendance at this session. If you have any questions please reach out to us via Goldcast or use the information below. We hope you enjoy the rest of the conference!

Jeffrey Stollenwerk jstollenwerk@salesforce.com

RESOURCE: Ample Data



	Behavior Scoring	Lead Scoring
	 6 months of prospect engagement data 20+ prospects linked to opportunities 	 1000+ leads created in last 200 days 120+ of those leads also converted to an account and contact
	Optimized Send Times	Engagement Frequency
	 v2 Connector Pardot Email in LEX 1+ email activity from prospect in ≤ 90 days 	 90 days of prospect email engagement data 5+ variations of email sends over a 28-day period, based on at least 10 recipients
Key Account	Campaign Insights	Campaign Attribution
 Accounts that are 6+ months old At least 1 account with opp created & 1 with no opps create in ≤6 months 	 Connected Campaigns 50+ connected campaigns 	 Connected Campaigns Campaign Influence 100+ opp contact roles and close date & amount values on opps

Einstein Campaign Attribution vs. Campaign Influence

