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**MParDreamin' 2022**

# Using Einstein AI within Account Engagement

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Lead Solution Engineer, Salesforce



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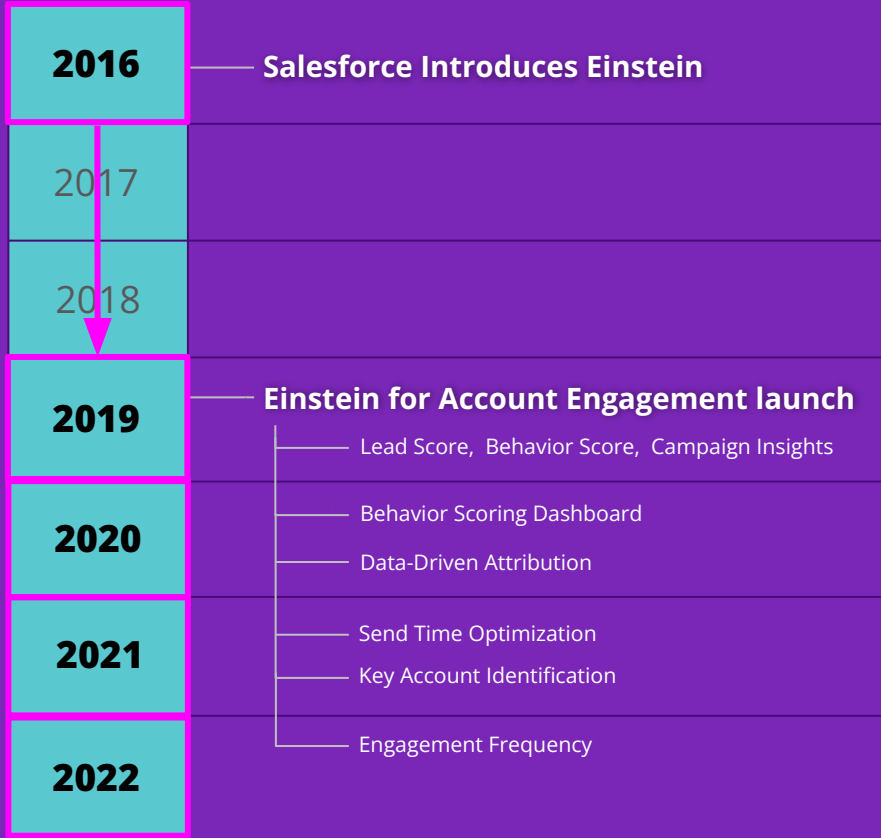
FIONTA

# Einstein AI Within Account Engagement

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



# Evolution of Einstein



# Einstein AI for Account Engagement

Growing set of **TURN-KEY** AI-powered features across **MULTIPLE OBJECTS** that **CONTINUOUSLY** monitor & analyze data from **ACCOUNT ENGAGEMENT & SALESFORCE** for **MARKETING & SALES INSIGHTS**



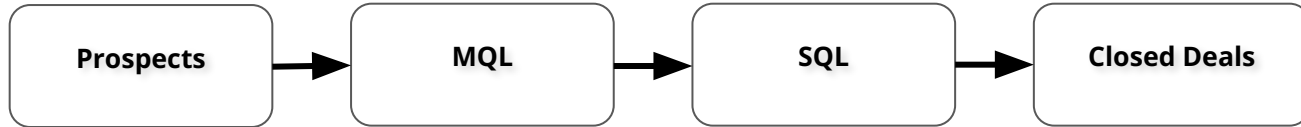
# Our Advantage: Easily Leverage

salesforce

# Data



**Leverage data from every stage in the Customer Lifecycle**



Send Time Optimization  
Email Frequency  
Campaign Insights

Behavior Score

Key Account Identification

Einstein Lead Score

Data-Driven Attribution  
Behavior Scoring Dashboard

# Our Advantage: Easily Leverage

salesforce

# Data

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.**

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 AI



- 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





# EINSTEIN MENU



*Marketing*

## Optimization

Send Time Optimization

Engagement Frequency



*Marketing & Sales*

## Prioritization

Lead Scoring

Behavior Scoring

Key Accounts Identification



*Marketing*

## Insights

Campaign Insights

Data-Driven Attribution

Behavior Scoring Dashboard



*Marketing*

## Optimization

Send Time Optimization

Engagement Frequency



# 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

### Send Time


**Einstein Optimized** Send Now Send Later

 Einstein can optimize email send times for individual prospects. Select a time frame for sending emails. [Tell Me More](#)



\* Start Date  

\* Label.Time  

\* Send Emails Within  hours

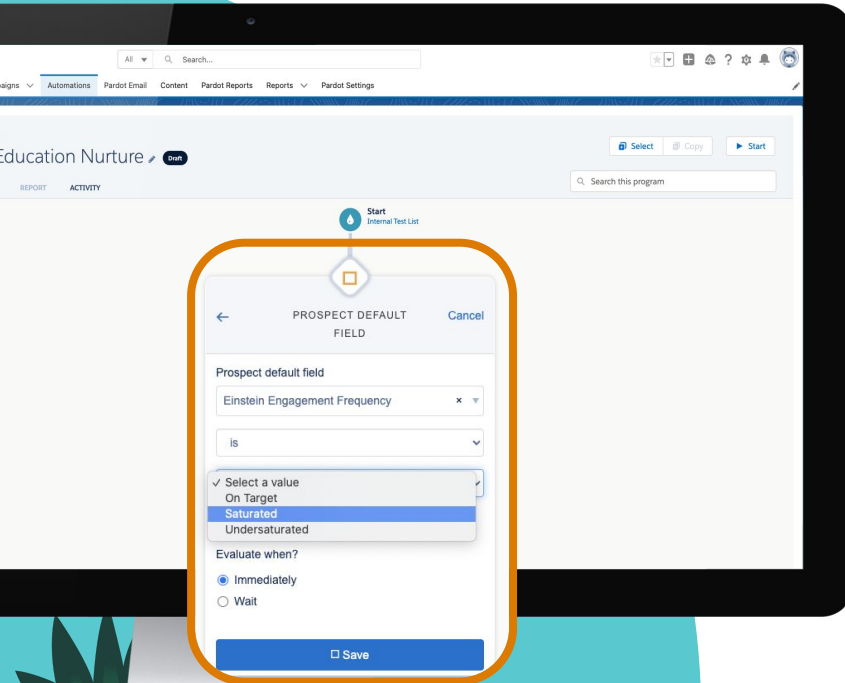
Enter a number between 3 and 168. 

The email is scheduled based on your timezone: Oct 27, 2022 1:22 AM PDT

 Email will be sent by Nov 4, 2022 4:00 PM PDT 

# Einstein Engagement Frequency

Identify the optimal send frequency for marketing emails



- AI-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



Search...



- Pardot Prospects
- Leads
- Contacts
- Visitors
- Segmentation
  - Segmentation Lists
  - Segmentation Rules
- Profiles
- Prospect Accounts



Ron Abelin

Edit Delete Sync with CRM

Overview Lists Profile Activities Audits Lifecycle Opportunities Related Objects

### Contents

Name Ron Abelin   

Email rabelin@example.com 

Company Omega, Inc. 

Account Name No account

Source Campaign Google Adwords

### Mailability

Status  Mailable

Email Uniqueness Email address is unique to this prospect.

Opted Out  False

Do Not Email  False

Soft Bounce Detected No

Hard Bounce Detected No

### Prospect Activities

Any Type Any Category

ACTIVITY	TYPE	SCORE	DATE / TIME
 Form: Demo Request	Success	50	May 6, 2022 9:05 AM
 Form: White Paper Download	Success	50	Oct 26, 2022 2:59 PM
 Form: Contact Us	Success	50	Jul 25, 2022 3:44 AM
 Form: Contact Us	Success	50	Jul 22, 2022 9:17 PM
 Form: Contact Us	Success	50	Apr 12, 2022 4:14 AM

Show Rows: 5 Previous Page 3 of 11 Next

### External Activities

ACTIVITY DATE / TIME

No external activities to show

[Find out more about Marketing App Extensions](#)



## Optimization

***Do More With Less!***

### Send Time Optimization

Helps you send the right message at the right time

↑ Engagement rates

### Engagement Frequency

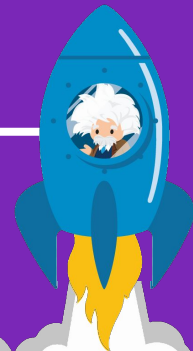
Identifies the optimal email volume for prospects

↓ Opt-out rates

✓ **DOING MORE**

- Flip of a switch
- Pick the send window
- Eliminates guesswork
- All automated

✓ **WITH LESS**







## Optimization

Send Time Optimization

Engagement Frequency

***Do More With Less!***

"Automation (segmentation of) my team 15-30 minutes of time in a day segmenting leads."

Zino Angelides,  
Elegran



# EINSTEIN MENU



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Engagement Frequency



*Marketing & Sales*

## Prioritization

Lead Scoring

Behavior Scoring

Key Accounts Identification

*Marketing*

## Insights

Campaign Insights

Data-Driven Attribution

Behavior Scoring Dashboard



*Marketing & Sales*

## **Prioritization**

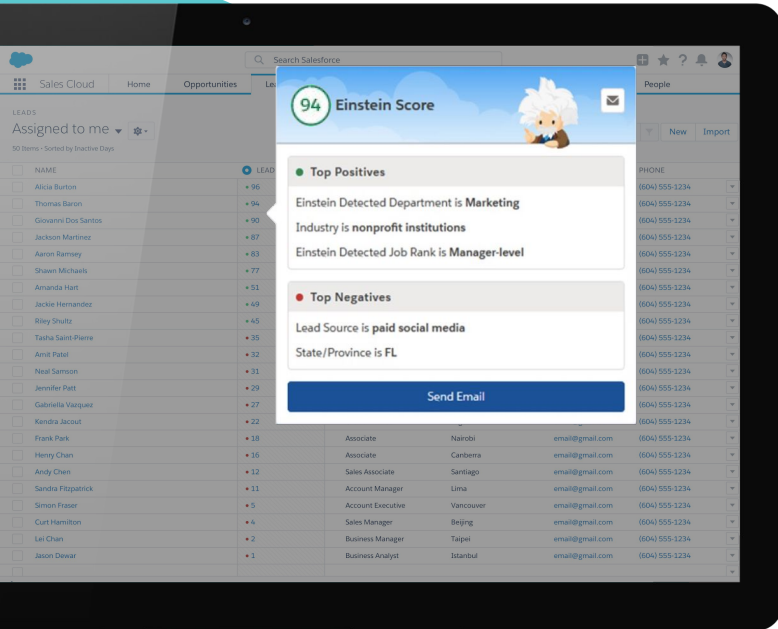
Lead Scoring

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

A screenshot of the Salesforce interface showing the Einstein Behavior Scoring feature. A cartoon character of Albert Einstein is positioned above a pop-up window. The pop-up window displays a 'Behavior Score' of 74 and lists 'Top Positives' such as 'Prospect's form submission count is in the top 20 percent of all prospects in the last month' and 'Prospect has viewed the page "Pricing Page" 5 times in the last 7 days'. The background shows a list of leads in the Salesforce system.

NAME	ROLE	LOCATION	EMAIL	PHONE
Alicia Burton	Growth Advisor	Lagos	email@gmail.com	(604) 555-1234
Thomas Baron	Associate	Nairobi	email@gmail.com	(604) 555-1234
Giovanni Dos Santos	Associate	Carriera	email@gmail.com	(604) 555-1234
Jackson Martinez	Sales Associate	Santiago	email@gmail.com	(604) 555-1234
Aaron Ramsey	Account Manager	Lima	email@gmail.com	(604) 555-1234
Shawn Michaels	Account Executive	Vancouver	email@gmail.com	(604) 555-1234
Amanda Hart	Sales Manager	Beijing	email@gmail.com	(604) 555-1234
Jackie Hernandez	Business Manager	Taipei	email@gmail.com	(604) 555-1234
Riley Shultz	Business Analyst	Istanbul	email@gmail.com	(604) 555-1234
Tasha Saint-Pierre				
Amal Patel				
Neal Sanson				
Jennifer Pratt				
Gabriella Vaquer				
Kendra Jacob				
Frank Park				
Henry Chan				
Andy Chen				
Sandra Fitzpatrick				
Simon Fraser				
Curt Hamilton				
Lei Chan				
Jason Dewar				

## 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

<b>Rules-Based Scoring</b>	<b>Einstein Scoring</b>
<p><b>There is no “silver bullet”</b></p> <p>There is a lot of guesswork involved in deciding what is valuable to conversion and deciding weighting</p>	<p><b>Takes away guesswork</b></p> <p>Einstein uses patterns in your historical data to automatically determine prioritization</p>
<p><b>Lacking context for sales reps</b></p> <p>No details to explain why Score/Grade is high/low and scores can get top-heavy</p>	<p><b>Provides valuable insights</b></p> <p>Einstein provides normalized scores (0-100) and the top positives &amp; negatives that influenced each score</p>
<p><b>Time-Consuming</b></p> <p>Customizing, maintaining, &amp; often times rebuilding your models can be a daunting task and results are not always accurate</p>	<p><b>Automated &amp; Continuous</b></p> <p>Einstein is automatically &amp; continuously analyzing your data to give Marketing time back in their day while resulting in more accurate &amp; up-to-date prioritization for Sales</p>

# Some Customers Use Both

They are not mutually exclusive!

## Einstein Behavior Score

74

### Behavior Score

#### ● Top Positives

Prospect's form submission count is in the top 20 percent of all prospects in the last month

Prospect has viewed the page "Pricing Page" 5 times in the last 7 days

This prospect uses the same email domain "salesforce.com" as 4 recently engaged prospects

+

## Rules-Based Scoring Categories

Score Overall: 484

- IT Services: 188
- Print Production: 45




# Einstein Key Account Identification

Surface Account potential with AI



### Einstein Insights



**Tier A** **3x** Likelihood to Convert Next Quarter

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?

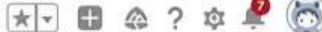
More than just a Salesforce Lightning component

- 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





Search...



**Campaign**  
**ABM Account Targeting**

+ Follow Clone with Related Send Engage Email View Campaign Hierarchy

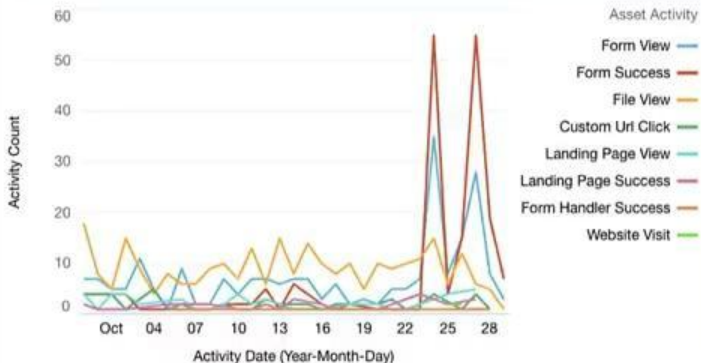
Type	Status	Start Date	End Date	Active
Event	In Progress	2/27/2022	3/29/2022	<input checked="" type="checkbox"/>

Details **Assets** **Engagement** Campaign Members

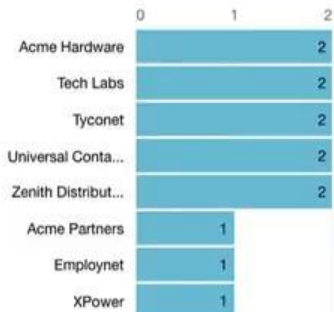
**Engagement History**

Data Updated: 10/29/2022, 8:33 AM

Activity Date 30 days ago t... Asset Type All Activity Type All



**Most Engaged Accounts**



**Insights** Activity Chatter

**Einstein Insights**

- High Email Engagement**  
Richardson
- Relevant List Email**  
Lakeside Webinar  
Lakeside would like to extend an invite to our upcoming webinar on transforming the remote experience.  
Sent 07/15/2018 To: 243 Recipients
- These Prospects have an email open rate of 73%, which is 22% higher than average
  - From Michigan
  - From Technology Roles
  - Engaged in Blog Content
- These Prospects have an email open rate of 65%, which is 14% higher than average



# EINSTEIN MENU



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## Optimization

Send Time Optimization

Engagement Frequency



*Marketing & Sales*

## Prioritization

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*Marketing*

## **Insights**

Campaign Insights

Data-Driven Attribution

Behavior Scoring Dashboard

# Einstein Campaign Insights

Unearth hidden campaign insights



The screenshot shows the Einstein Campaign Insights interface. At the top, it says 'Einstein Insights' next to a cartoon illustration of Albert Einstein. Below this, there are four insight cards. The first card is titled 'Higher Lead Conversion' for a 'Tradeshow Campaign' and notes that it is creating leads with the job title 'CIO' 72% more than other campaigns. It has 'Email' and 'Dismiss' buttons. The second card is 'Interesting Audience Iden...' for a 'Tradeshow Campaign' with 'Email', 'X', and a dropdown icon. The third card is 'Higher Prospect Engagem...' for a 'Tradeshow Campaign' with 'Email', 'X', and a dropdown icon. The fourth card is 'Lower Asset Engagement' for a 'Webinar Campaign' with 'Email', 'X', and a dropdown icon.

- 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

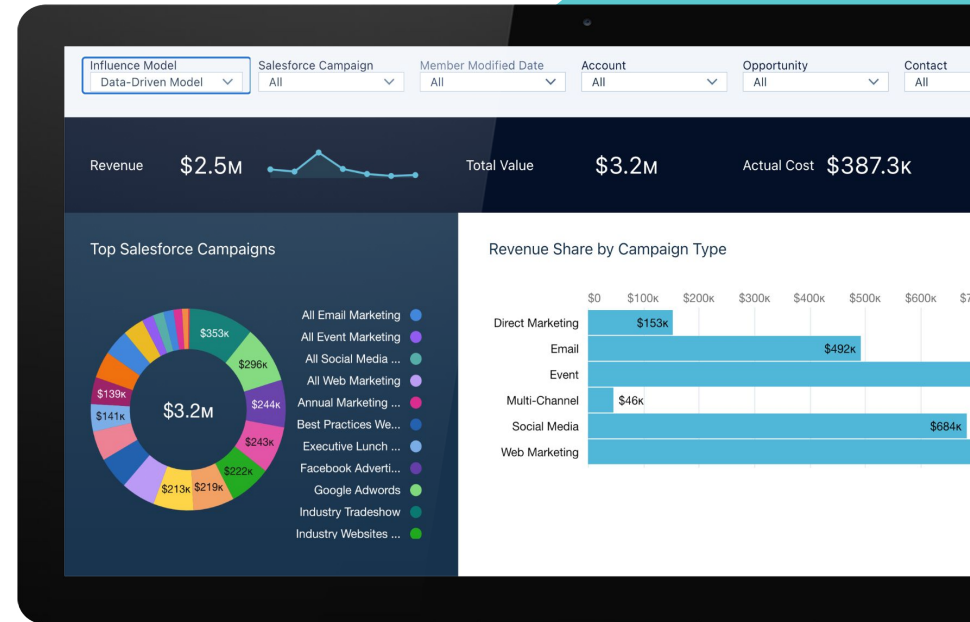
Accurately reflect Marketing's revenue influence

## 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



## 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



# EINSTEIN MENU



## 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

AI-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](mailto:jstollenwerk@salesforce.com)

# RESOURCE: Ample Data



	<b>Behavior Scoring</b> <ul style="list-style-type: none"><li>• 6 months of prospect engagement data</li><li>• 20+ prospects linked to opportunities</li></ul>	<b>Lead Scoring</b> <ul style="list-style-type: none"><li>• 1000+ leads created in last 200 days</li><li>• 120+ of those leads also converted to an account and contact</li></ul>
	<b>Optimized Send Times</b> <ul style="list-style-type: none"><li>• v2 Connector</li><li>• Pardot Email in LEX</li><li>• 1+ email activity from prospect in <math>\leq 90</math> days</li></ul>	<b>Engagement Frequency</b> <ul style="list-style-type: none"><li>• 90 days of prospect email engagement data</li><li>• 5+ variations of email sends over a 28-day period, based on at least 10 recipients</li></ul>
<b>Key Account</b> <ul style="list-style-type: none"><li>• Accounts that are 6+ months old</li><li>• At least 1 account with opp created &amp; 1 with no opps create in <math>\leq 6</math> months</li></ul>	<b>Campaign Insights</b> <ul style="list-style-type: none"><li>• Connected Campaigns</li><li>• 50+ connected campaigns</li></ul>	<b>Campaign Attribution</b> <ul style="list-style-type: none"><li>• Connected Campaigns</li><li>• Campaign Influence</li><li>• 100+ opp contact roles and close date &amp; amount values on opps</li></ul>

# Einstein Campaign Attribution vs. Campaign Influence

