

### Learn. Network. Grow. MParDreamin' 2022

# Using Einstein Al within Account Engagement

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Lead Solution Engineer, Salesforce





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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



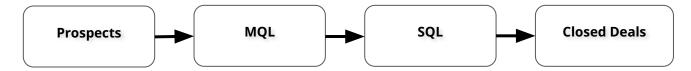
# **Our Advantage: Easily Leverage**

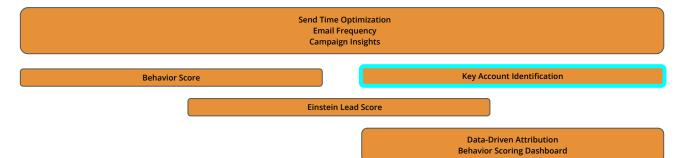
salesforce

### 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. ()								
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# **Einstein Engagement Frequency**



Identify the optimal send frequency for marketing emails

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	Undersaturated			
	Evaluate when?			
	<ul> <li>Immediately</li> </ul>			
	⊖ 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

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### **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**

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Marketing & Sales

# **Prioritization**

Lead Scoring

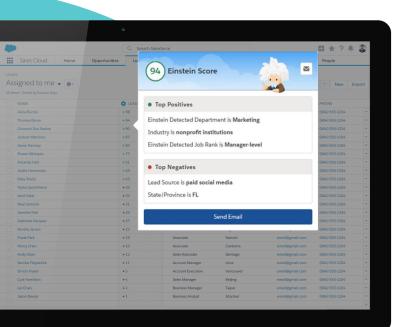
**Behavior Scoring** 

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

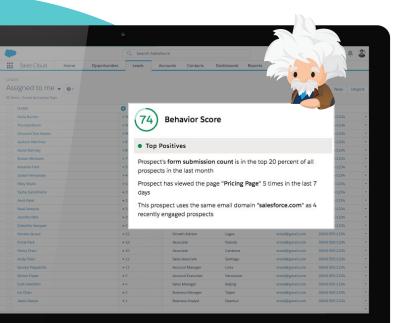
## Predictive Insights

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

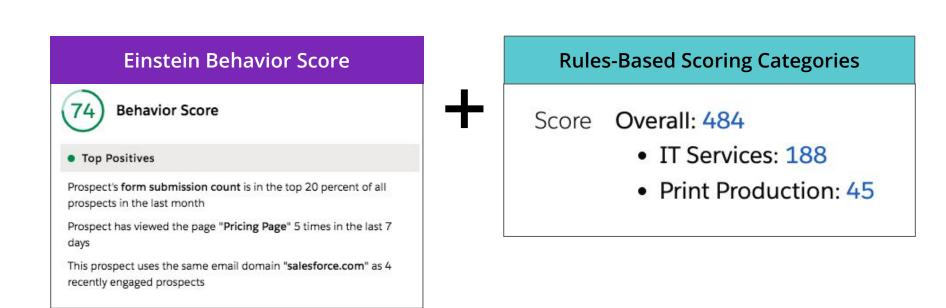
<b>Rules-Based Scoring</b>	Einstein Scoring
There is no "silver bullet"	<b>Takes away guesswork</b>
There is a lot of guesswork involved in deciding what is	Einstein uses patterns in your historical data to
valuable to conversion and deciding weighting	automatically determine prioritization
<b>Lacking context for sales reps</b>	<b>Provides valuable insights</b>
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
<b>Time-Consuming</b>	<b>Automated &amp; Continuous</b>
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

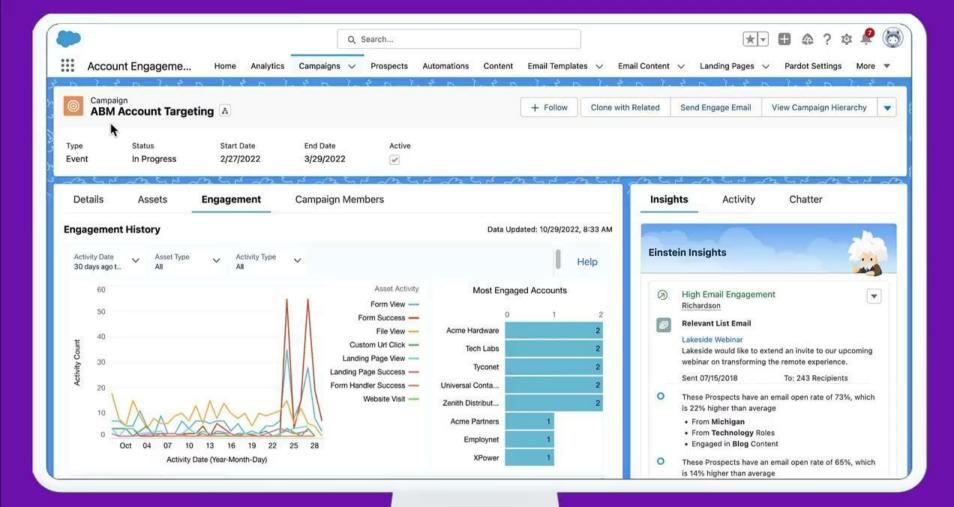
Pulls attributes from Salesforce's proprietary data warehouse which can also be pushed to fields

# 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

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	Key Accounts Identification	Behavior Scoring Dashboard

# Marketing

**Campaign Insights** 

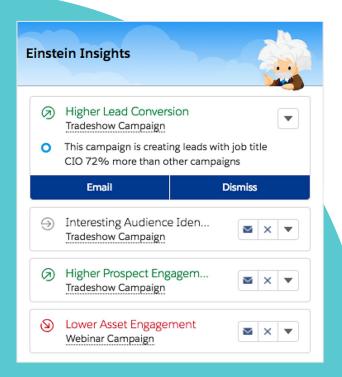
Data-Driven Attribution

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

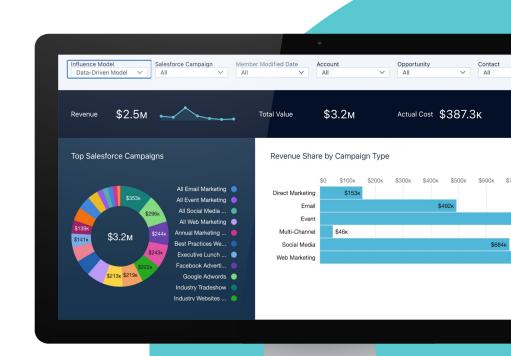
Accurately reflect Marketing's revenue influence

### 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

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#### 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
	<ul> <li>6 months of prospect engagement data</li> <li>20+ prospects linked to opportunities</li> </ul>	<ul> <li>1000+ leads created in last 200 days</li> <li>120+ of those leads also converted to an account and contact</li> </ul>
	Optimized Send Times	Engagement Frequency
	<ul> <li>v2 Connector</li> <li>Pardot Email in LEX</li> <li>1+ email activity from prospect in ≤ 90 days</li> </ul>	<ul> <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>
Key Account	Campaign Insights	Campaign Attribution
<ul> <li>Accounts that are 6+ months old</li> <li>At least 1 account with opp created &amp; 1 with no opps create in ≤6 months</li> </ul>	<ul> <li>Connected Campaigns</li> <li>50+ connected campaigns</li> </ul>	<ul> <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

