



Build AI Driven Journeys In Marketing Cloud



Hunter Dunbar



Tim Ziter



Thanks To Our Incredible Sponsors

SERCANTE
A Trilliad Company



TRILLIAD
A Growth Services Provider

stensul

storylane


Trailblazer
COMMUNITY

 **AuctusIQ**

**JU
ST**

SANDLER

Agenda

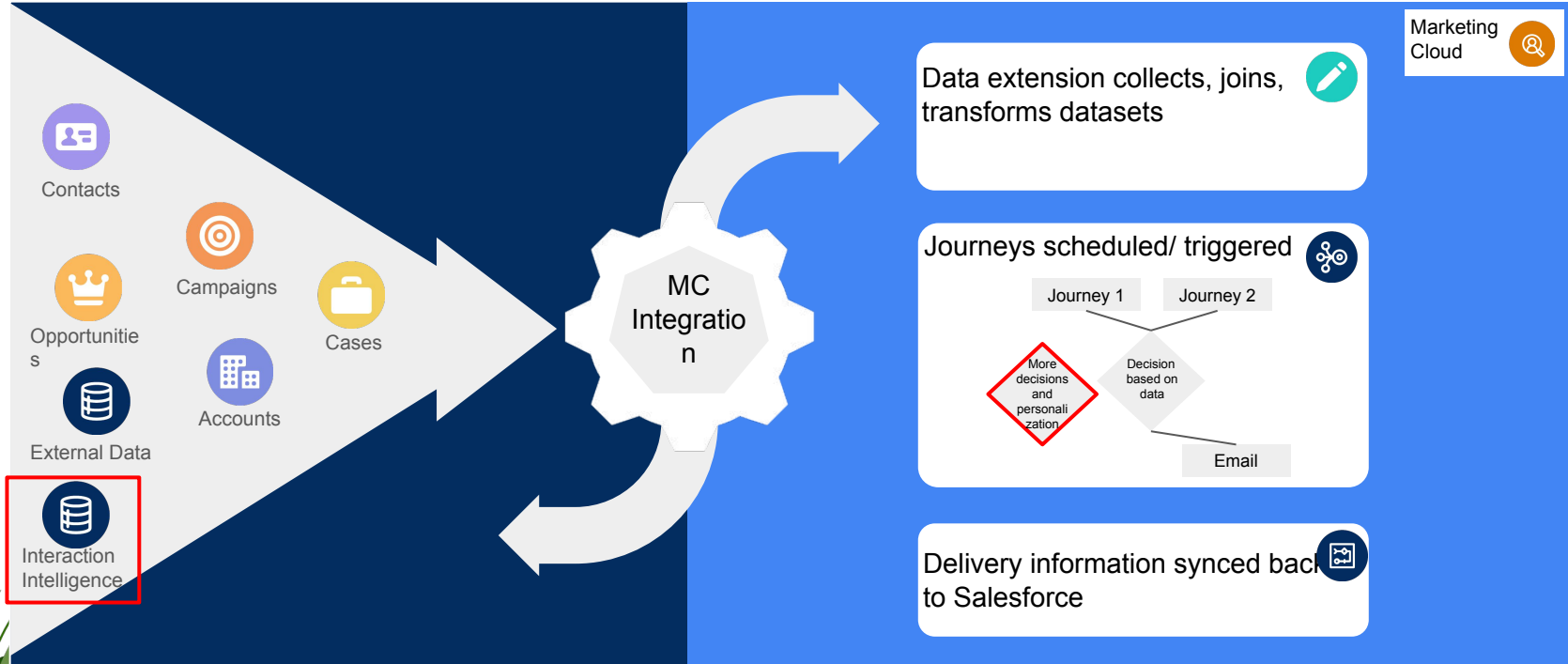
- Transcription History
- Custom GenAI Architecture
- Demo - Prompt Builder
- AI Driven Journeys in Marketing Cloud



Marketing Journeys

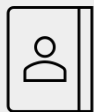


Traditionally when we create journeys in Marketing Cloud, we have relied on contact-based data sources. This is Salesforce and other enterprise application data. Interaction intelligence allows us to further enrich data sets and create better tailored journeys.



Traditional Journeys

AI-Powered Journeys



Demographic Account/Contact Data

Name: Victoria | Age : 67 | Address: Staunton, VA |
Occupation: Physical Therapist | Income: \$99k

Name: Abigail | Age: 37 | Location: Marquette, MI |
Occupation: Orthodontist | Income: \$400k

Demographic Account/Contact Data

Name: Victoria | Age : 67 | Address: Staunton, VA |
Occupation: Physical Therapist | Income: \$99k

Name: Abigail | Age: 37 | Location: Marquette, MI |
Occupation: Orthodontist | Income: \$400k



Marketing Cloud Journey Building

Manually create journeys.
Manually create and manage content.

Interaction Intelligence

Gather advanced insights about customers by using
tools to collect unstructured interaction data.
Utilize AI to extract topics and insights from
unstructured transcript data.
Einstein Conversation Insights



Marketing Cloud Journey Building

Advanced segmentation and journey paths
1 to 1 Content at Scale (Einstein Insights, Typeface,
advanced CMS)
Next Best Follup Actions



A Brief History of Transcription



Pre 20th Century

We have been documenting spoken stories for millenia.

- Drawing on caves
- Monks in monasteries transcribing books and stories to preserve knowledge
- Printing press
- Advent/expansion of stenography in the 18th and 19th centuries

Early 1900s

Manual transcription was done by stenographers writing shorthand notes and typing transcripts. Very labor intensive.

Mid 1900s

Sound recording devices allowed capturing audio that could be manually transcribed later. Devices like tape recorders started being used to record conversations for future transcription.

1970s

Word processors and personal computing started automating some of the manual effort in transcribing from shorthand to full text. But audio transcription was still manual.

1980s

Advance voice recognition technology emerged that could automatically transcribe human speech into machine readable text. But early systems had very high error rates.

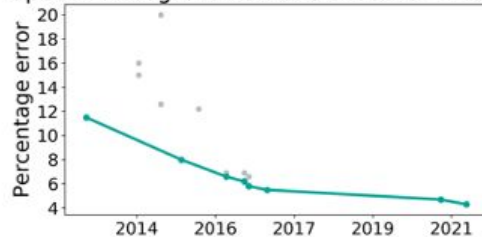
1990-2000s

As computing power increased, speech recognition and voice transcription systems improved considerably though still had limitations..

2010s

With neural networks and deep learning for speech recognition, automatic speech transcription made major advances lowering error rates to 5-8% for general conversational speech.

Speech Recognition on Switchboard + Hub500



Transcription has achieved extremely low error rates.

NER | Sentiment Analysis | GenAI



Named Entity Recognition 📄

Take unstructured text and identify entities within that text

Marc Benioff, the **CEO** of **Salesforce**, gave the keynote speech at the **conference** in **Paris** last week.

Marc Benioff = Person | CEO = title | Salesforce = Org | Paris = Location

Good to see you again Alex. It's been a few years so I'm pleased we can get caught up on where things stand today across your **financial picture**.
Good to see you again = Album (Whitesnake) | Alex = Person | financial picture = wealth mgmt term

Sentiment Analysis 📄

Take unstructured text and utilized keywords to score Positive or Negative Sentiment

The presentation was great and I learned a lot

😊 Positive = 94% 😞 Negative = 6%

The presentation was **awful** good and I learned a lot

😊 Positive = 75% 😞 Negative = 25%

Gen AI 🧠

Take unstructured text and identify entities within that text

PROMPT:

Take the following text and tell me what entities are mentioned in the sentence: "Marc Benioff, the CEO of Salesforce, gave the keynote speech at the conference in Paris last week."

RESPONSE:

Hello, the following entities are mentioned:

Marc Benioff
CEO
Salesforce
Paris

Let me know if I can be of any more help.



NER | Sentiment Analysis | GenAI



GenAI provides more accurate and power extraction of entities and topics than other NER tools that we tested. however, there are tradeoffs

Technology	Advantages	Disadvantages
Sentiment Analysis	Structured response Metrics	Limited details Complexity of language
NER	Structured response Built in categorization	Accuracy Flexibility
GenAI	Accuracy Flexibility	Unstructured response Governance of prompt engineering AI Trust

Conversational/Interaction Intelligence

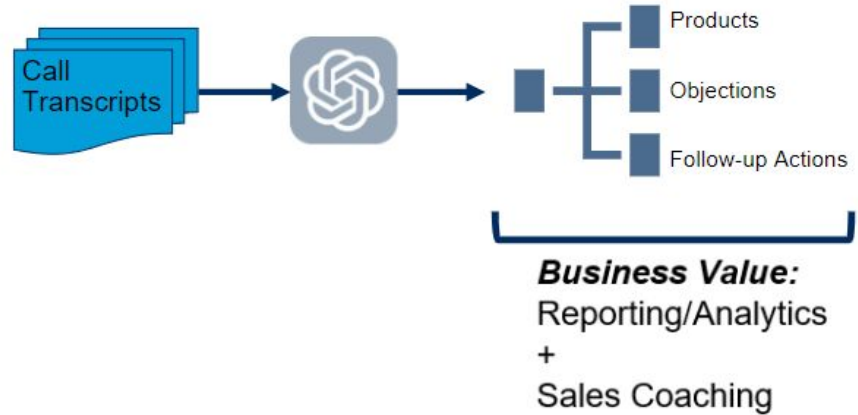
Transcription Tech + AI has unlocked a rich new datasource for use in all aspects of the Revenue Operations stack. Marketing journeys which try to maximize personalization and alignment are a natural application for these insights.



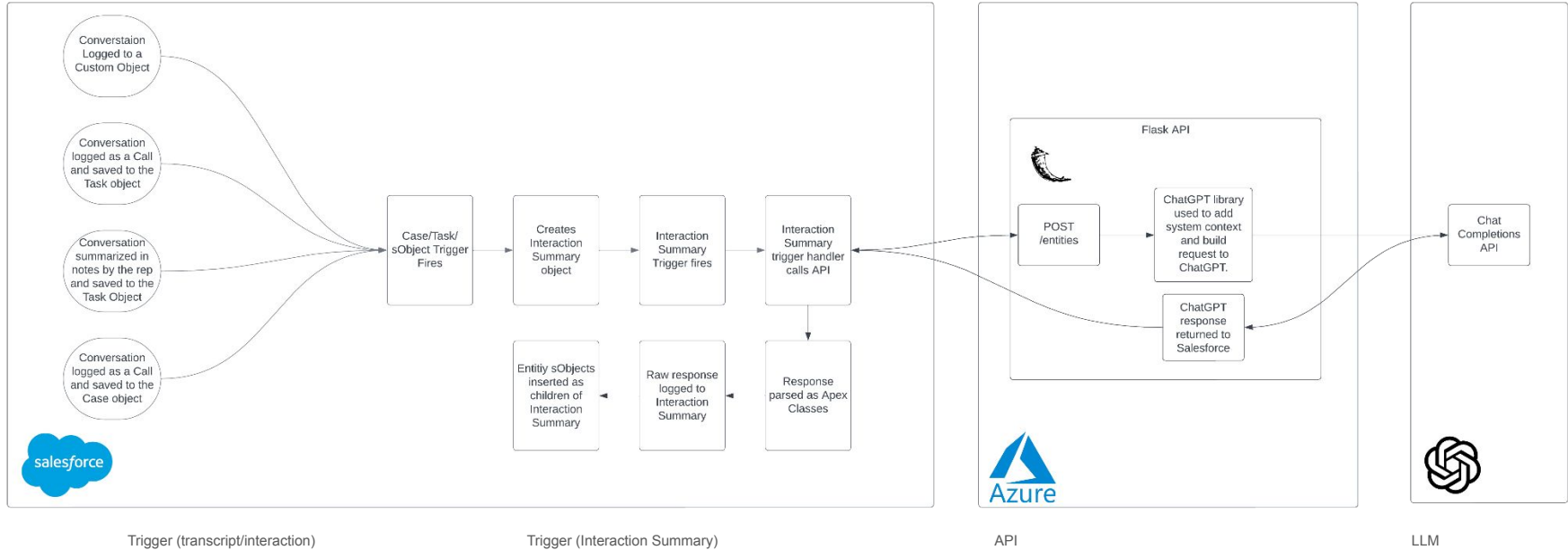
Application Overview



Application takes unstructured call transcript data between a Wealth Advisor and a potential client and extracts the Financial Goals, Products, Objections, and Follow up Actions that were discussed on the call. These discrete entities are saved to a table in Salesforce for reporting and analysis.



Custom GenAI Architecture



Entities

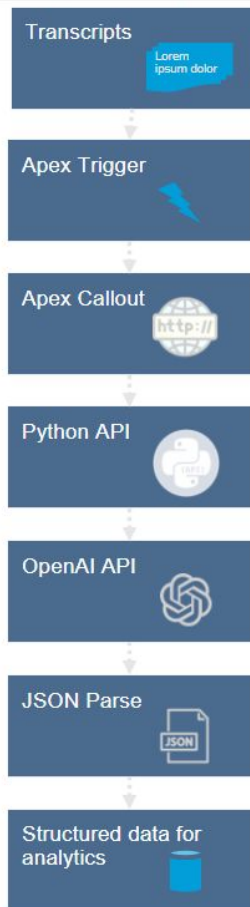


Migrating LLM Integration to Prompt Builder

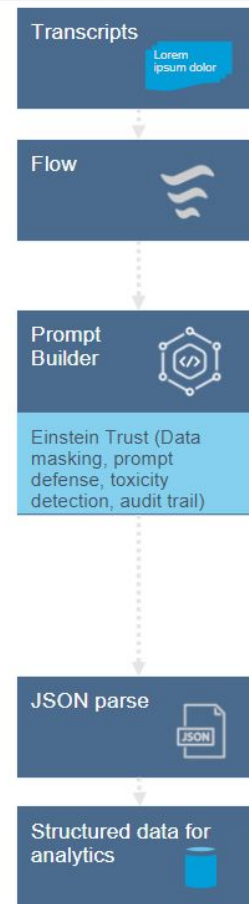
Prompt Builder to **rebuild the Conversational Intelligence application in under 4 hours.**

Multicomponent coded solution simplified using Salesforce GUI-based tooling (flow + process builder).

Previous Application Components/ Flow



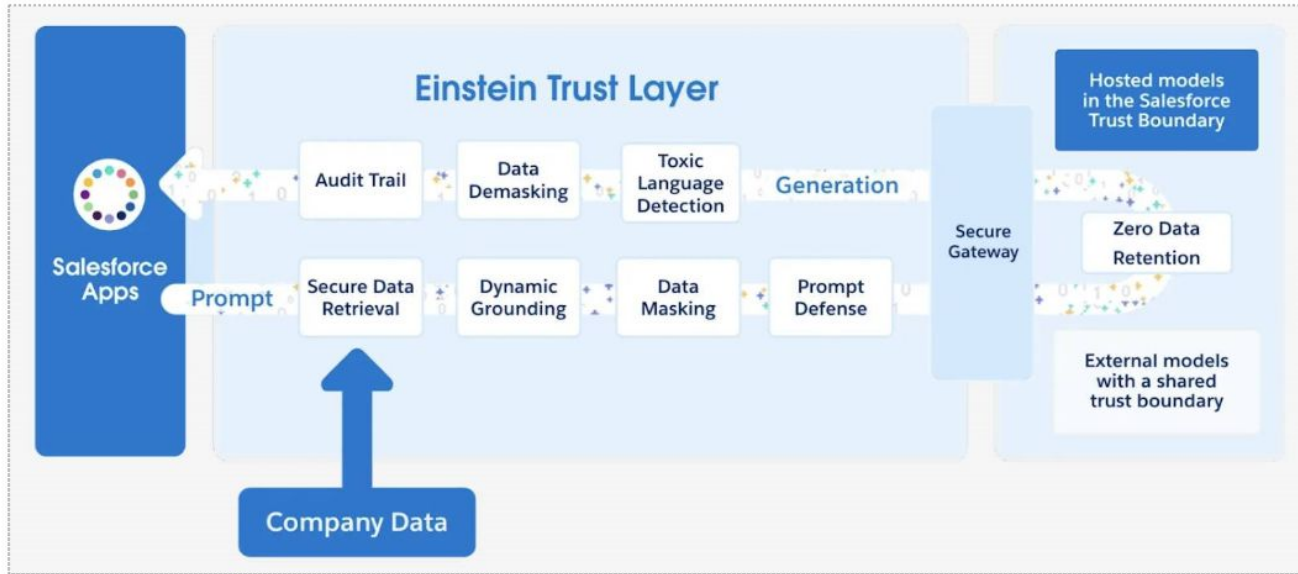
Application Components with Prompt Builder



Security Advantages



Salesforce provides tooling to make your AI solutions more *safe and secure*. In a purely custom build, features like *data masking*, *prompt defense*, and *toxic language detection* would need to be built from scratch.



Trigger



```
trigger InteractionSummary on Interaction_Summary__c (after insert) {  
    for(Interaction_Summary__c interactionSummary:Trigger.new){  
        if(interactionSummary.Transcript__c != null){  
            InteractionSummaryUtilities.callAPI(interactionSummary.Id,  
                                                interactionSummary.Transcript__c,  
                                                true);  
        }  
    }  
}
```



Callout



```
@future(Callout=true)
public static void callAPI(Id InteractionSummaryId, String sampleText, boolean gpt){
    Interaction_Summary__c is = [Select Id, Transcript__c FROM Interaction_Summary__c WHERE Id = :InteractionSummaryId LIMIT
1];
    TranscriptInsightsResponse insightsWrapper = TranscriptInsightsService.extractInsightsFromGPT(is.Transcript__c);
    if(insightsWrapper != null) {
        is.API_Response__c = JSON.serializePretty(insightsWrapper);
        update is;
        insertEntities(InteractionSummaryId, insightsWrapper.followupActions,
            insightsWrapper.goals, insightsWrapper.objections,
            insightsWrapper.products);
    }
}
```

Callout



```
HttpRequest request = new HttpRequest();
//request.setEndpoint(BASE_URL + ENDPOINT);
request.setEndpoint(test);
request.setMethod('POST');
request.setHeader('Content-Type', 'application/json');
request.setHeader('Authorization', 'Bearer ' + TOKEN);
request.setHeader('api-key', TOKEN);

request.setTimeout(60000);
Map<String, Object> requestParams = new Map<String, Object>{
    'model' => model,
    'messages' => messages,
    'temperature' => temperature,
    'response_format' => new Map<String, String>{'type' => 'json_object'}
};

request.setBody(JSON.serialize(requestParams));

Http http = new Http();
HttpResponse response = http.send(request);
//return response.getBody();
if (response.getStatusCode() == 200) {
    Map<String, Object> jsonResponse = (Map<String, Object>)JSON.deserializeUntyped(response.getBody());
    List<Object> choices = (List<Object>)jsonResponse.get('choices');

    if (choices != null && choices.size() > 0) {
        Map<String, Object> firstChoice = (Map<String, Object>)choices[0];
        Map<String, Object> message = (Map<String, Object>)firstChoice.get('message');
        TranscriptInsightsResponse responseWrapper = (TranscriptInsightsResponse)JSON.deserialize((String)message.get('content'), TranscriptInsightsResponse.class);
        System.debug('Ash_Test '+responseWrapper.agentName);
        return responseWrapper;
    }
}
```


Parse Response



```
for(TranscriptInsightsResponse.FollowupAction action : followupActions) {
    Entity__c e = new Entity__c(Interaction_Summary__c = InteractionSummaryId, Entity_Detail__c = action?.action,
    Category__c = action?.category, Type__c = FOLLOWUP_ACTION);
    entities.add(e);
}
for(TranscriptInsightsResponse.Goal goal : goals) {
    Entity__c e = new Entity__c(Interaction_Summary__c = InteractionSummaryId, Entity_Detail__c = goal?.goal,
    Category__c = goal?.category, Type__c = GOAL_CONST);
    entities.add(e);
}
for(TranscriptInsightsResponse.Objection obj : objections) {
    Entity__c e = new Entity__c(Interaction_Summary__c = InteractionSummaryId, Entity_Detail__c = obj?.objection,
    Category__c = obj?.category, Type__c = OBJECTION);
    entities.add(e);
}
for(TranscriptInsightsResponse.Product prod : products) {
    Entity__c e = new Entity__c(Interaction_Summary__c = InteractionSummaryId, Entity_Detail__c = prod?.product,
    Category__c = prod?.category, Type__c = PRODUCT);
    entities.add(e);
}
insert entities;
```

AI Driven Journeys

salesforce

Advanced Segmentation & Journey Paths

- Contact Builder
- Automation Studio
- Decision splits

CODE: SQL



1-to-1 Content at Scale

- Einstein Insights
- Typeface
- Data Ext CMS

CODE: Ampscript

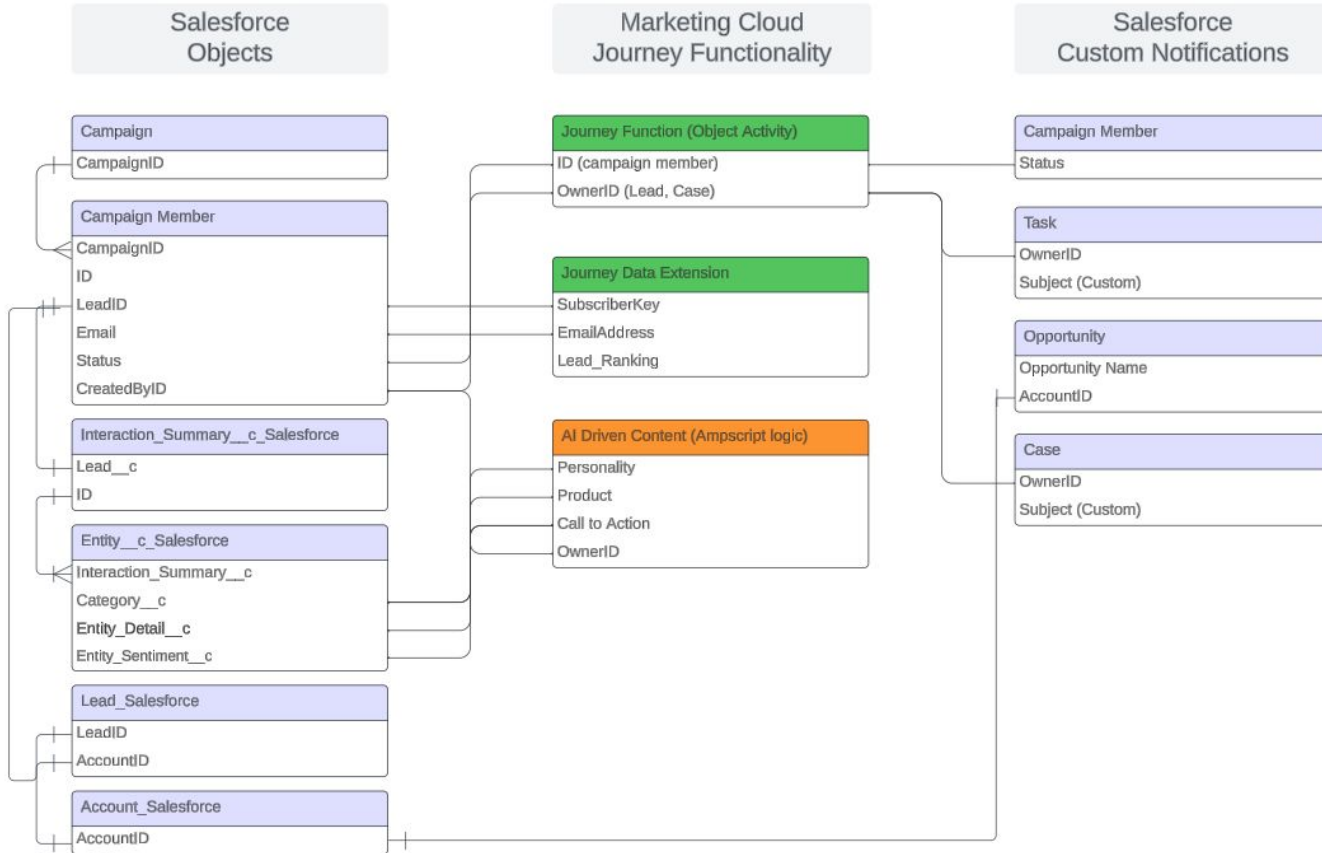


Next Best Follow-up Actions

- Object creation & personalization
- Maximize conversion



Journey Schema



Leveraging Unstructured Data



Interaction Summaries > IS-0026

Entities

<input type="checkbox"/>	Entity Name	Entity Detail	Category	Type
10	<input type="checkbox"/> ENTY-0372	Urgent, deciding in 0-30 days	timeframe	Goal



- Ranking
- Call-to-action



Interaction Summaries > IS-0026

Entities

<input type="checkbox"/>	Entity Name	Entity Detail	Category	Entity Sent...	Type
6	<input type="checkbox"/> ENTY-0359	disability insurance	insurance products		Product
7	<input type="checkbox"/> ENTY-0360	long-term care insurance	insurance products		Product
8	<input type="checkbox"/> ENTY-0361	Trust Fund	estate planning	Positive	Product
9	<input type="checkbox"/> ENTY-0362	Annuity	insurance products	Positive	Product



- Image/Text
- Opportunity



Leveraging Unstructured Data



Interaction Summaries > IS-0026

Entities

<input type="checkbox"/>	Entity Name	Entity Detail	Category	Type
2	<input type="checkbox"/> ENTY-0355	Ensuring the long-term care and financial well-being of a special needs individual	Special Needs Planning	Goal
5	<input type="checkbox"/> ENTY-0358	Isn't that process complicated? Plus the fees..	cost objections	Objection



- Image/Text
- Object notes

Interaction Summaries > IS-0026

Entities

<input type="checkbox"/>	Entity Name	Entity Detail	Category	Type
1	<input type="checkbox"/> ENTY-0354	Schedule another meeting to detail insurance and trust fund options, including costs	default category	Followup Action



- Hot lead notification
- Call task

SQL - Unstructured merged with CRM data



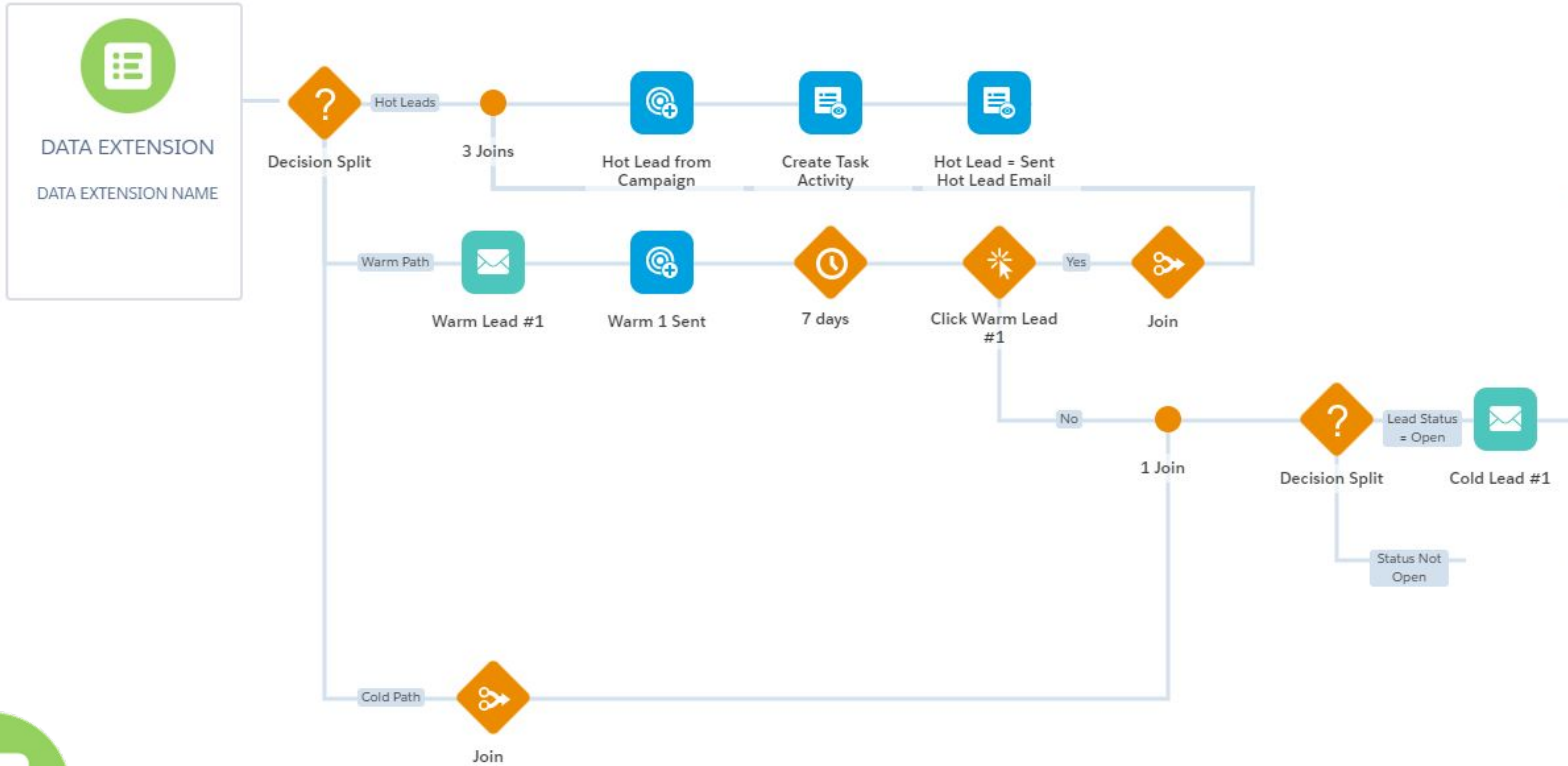
```
SELECT L.ID, L.Name,
       CASE
         WHEN L.Predictive_Score__c = 'HOT' AND E2.LLMRank = 'COLD' THEN 'Cold'
         WHEN L.Predictive_Score__c = 'Warm' AND E2.LLMRank = 'Warm' THEN 'Warm'
         WHEN L.Predictive_Score__c = 'Cold' AND E2.LLMRank = 'HOT' THEN 'Hot'
         ELSE 'Warm' END AS Lead_Rank
FROM CampaignMember_Salesforce AS CM
JOIN Lead_Salesforce AS L ON CM.LeadOrContactId = L.ID
JOIN ( SELECT I.Lead__c, E.ID AS EntityID, E.Entity_Detail__c, E.Category__c,
           CASE
             WHEN E.Entity_Detail__c LIKE '%0-30%' THEN 'HOT'
             WHEN E.Entity_Detail__c LIKE '%6+%' THEN 'Cold'
             ELSE 'Warm' END AS LLMRank
        FROM Entity__c_Salesforce AS E
        JOIN Interaction_Summary__c_Salesforce AS I ON I.ID = E.Interaction_Summary__c
        WHERE E.Category__c = 'timeframe'
        AND ((E.Entity_Detail__c LIKE '%0-30%') OR (E.Entity_Detail__c LIKE '%6+%'))
      ) AS E2 ON L.ID = E2.Lead__c
WHERE CM.CampaignID = '7013s0000000bkTMAAY'
```

Interaction Summaries > IS-0026
Entities

<input type="checkbox"/>	Entity Name	Entity Detail	Category	Type
10	<input type="checkbox"/> ENTY-0372	Urgent, deciding in 0-30 days	timeframe	Goal




Audience Definition & Journey Path



Marketing Cloud AI Tools






Setup
Einstein Copy Insights

Multi-Taskers


Personality Description

A simple, straightforward style that doesn't offer a lot of options as this personality is juggling a lot of projects on their plate. Keep it simple, straight to the point and offer promotional incentives to get them to act now.


Brand kit



Cervello Annuity Insurance



The brand kit section displays two images. The left image shows an elderly couple sitting on a bench under a large tree, looking at a document together. The right image shows a desk with a lamp, a smartphone, and a document titled 'ANNUITY'.



Einstein Copy Insights
Subject Line Generation

Entries

Brand Personality ⓘ [View Brand Identity](#)

Multi-Taskers ▾

Draft Subject Lines

<input type="checkbox"/>	Discover the benefits of data archiving today!	👍	👎
<input type="checkbox"/>	Simplify your data management with our archiving solutions.	👍	👎
<input type="checkbox"/>	Don't let data overload slow you down - try our archiving system.	👍	👎



Ampscript - Next Best Product



```
SET @LeadID = AttributeValue("SubscriberKey")
SET @InteractionSummaryID = LOOKUP("Interaction_Summary__c_Salesforce", "ID", "Lead__c", @LeadID)
SET @rows = LookupOrderedRows("EntityCount",1, "CategoryCount_DESC", "Interaction_Summary__c", @InteractionSummaryID)
SET @rowCount = rowcount(@rows)
IF @rowCount > 0 then
  FOR @i = 1 to 1 DO
    SET @row = row(@rows, @i)
    SET @Category = field(@row, "Category__c")
  NEXT @i
ENDIF
SET @Product = LOOKUP("Entity__c_Salesforce", "Entity_Detail__c", "Interaction_Summary__c",
  @InteractionSummaryID, "Category__c", @Category, "Entity_Sentiment__c", "Positive")
```

```
SELECT Interaction_Summary__c,
  MAX(Category__c) AS Category__c,
  COUNT(Category__c) AS CategoryCount
FROM Entity__c_Salesforce
WHERE Type__c = 'Product'
GROUP BY Category__c,
  Interaction_Summary__c
```

Interaction Summaries > IS-0026
Entities

	<input type="checkbox"/> Entity Name	Entity Detail	Category	Entity Sent...	Type
6	<input type="checkbox"/> ENTY-0359	disability insurance	insurance products		Product
7	<input type="checkbox"/> ENTY-0360	long-term care insurance	insurance products		Product
8	<input type="checkbox"/> ENTY-0361	Trust Fund	estate planning	Positive	Product
9	<input type="checkbox"/> ENTY-0362	Annuity	insurance products	Positive	Product

Ampscript - AI Content Mgmt System



```
SET @LeadID = AttributeValue("SubscriberKey")
SET @Personality = LOOKUP("PersonaMatch","Persona",ID, @LeadID)
SET @num1 = 1
SET @num2 = 5
SET @version = random(@num1, @num2)

SET @rows = LookupRows("Insurance_CMS","Personality", @Personality, "Version",@version )
SET @rowCount = rowcount(@rows)
IF @rowCount > 0 then
  FOR @i = 1 to 1 DO
    SET @row = row(@rows, @i)
    SET @Subject = field(@row,"Subject")
    SET @Bodytext = field(@row,"Body")
    SET @HeroImage = field(@row,"Image")
  NEXT @i
ENDIF
```

Interaction Summaries > IS-0026

Entities

<input type="checkbox"/>	Entity Name	Entity Detail	Category	Type
<input type="checkbox"/>	ENTY-0355	Ensuring the long-term care and financial well-being of a special needs individual	Special Needs Planning	Goal
<input type="checkbox"/>	ENTY-0358	Isn't that process complicated? Plus the fees...	cost objections	Objection

Data Extensions > HandsOn > EinsteinAI > Insurance_Body_Content

Insurance_Body_Content Available

This data extension showcases the body content! Properties Records

Export Import


Personality	Version	Content
Motivational	1	Did you know that organizing your data can lead to a more productive
Motivational	2	Are you tired of constantly searching for important documents and file organization skills.
Motivational	3	In today's fast-paced world, time is a precious commodity. Don't waste yourself and try our products today.
Multi-Taskers	1	Data management can be overwhelming, but with the help of a data a
Multi-Taskers	2	Are you tired of spending hours searching for important data? Our da
Multi-Taskers	3	As a busy professional, you have a lot on your plate. Let our data arc
Do It Yourself	1	Data archiving is an essential tool for any organization that wants to n it can benefit your organization today.
Do It Yourself	2	Are you tired of dealing with data overload? Our data archiver can hel see how it can make your life easier.
Do It Yourself	3	If you're looking for a reliable and secure way to store and manage yc your data today.


1-to-1 Content at Scale



Abigail (0026)


- Retirement age
- High Intent

 Cervello
by KEARNEY company



Dear Jane,

Annuity retirement savings can help you with peace of mind, knowing that you have a reliable source of income for your golden years. By bundling our annuity products, you can customize your retirement plan to fit your unique needs and goals. Don't wait until it's too late to start planning for your future. Start investing in your retirement today.



Annuity Plan

- Stable, Guaranteed
- Multiple payout options
- Piece of mind
- 24/7 support


Special Offer - Free Discovery Session

Interested in a FREE discovery session so we can learn how to help improve your 401k experience at Keamey.


Click here and we'll reach out to schedule a free session.

[Let's Talk](#)

Thank you we'll be in touch soon.

 **Have questions?**
I can help. Contact me.

Tim Ziter
Consultant
Office: (802) 318-2077
tziter@mycervello.com

 Cervello
by KEARNEY company

 Cervello
by KEARNEY company



Dear Abigail,

Imagine being able to live your life without worrying about unexpected expenses. With our life insurance products, you can do just that. Our bundles that can cover everything from funeral expenses to mortgage payments. You can rest easy knowing that you and your loved ones are protected from life's uncertainties.

Life Insurance

- Provide financial security
- Multiple payment options
- Piece of mind
- 24/7 support

See What We Can Do

Learn more about all of our special services to help improve your 401k experience at Keamey.

[Learn More](#)

Thank you we'll be in touch soon.

 Cervello
by KEARNEY company

Victoria (0027)

- Young professional
- Low Intent



Next Best Follow Up Actions



Journey Builder

Journeys Events History Templates System Optimization

Feedback Cervello

Journeys Dashboard > Journey Lead_Nurture_Journey_Test_1

Version 4.1

Save

Create Task Activity

SELECT OBJECT SELECT ACTION MAP FIELDS

Select fields to update.

RECOMMENDED

- ✓ Assigned To ID = OwnerId
- ✓ Name ID = SubscriberKey
- ✓ Subject = Attention! You have a {{Event."DEAudience-131d761b-7ac6-9f8a-0f69-2c3ae57fd157"."Lead_Ranking_Simple"}} lead for company: {{Event."DEAudien...

- Next best action
- AI datapoint in handlebar code

Interaction Summaries > IS-0026

Entities

<input type="checkbox"/>	Entity Name	Entity Detail	Category	Type
1	<input type="checkbox"/> ENTY-0354	Schedule another meeting to detail insurance and trust fund options, including costs	default category	Followup Action



Recap



- Transcription History
- Custom GenAI Architecture
- Demo - Prompt Builder
- AI Driven Journeys in Marketing Cloud



Questions?



Thank You!

