

Democratizing Artificial Intelligence using a Scalable Low Code CRM Platform

November 8th 2018

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Prepared for:



Talk

Artificial intelligence (AI) for CRM is now a reality. I will illustrate this by demonstrating Salesforce Einstein AI. It allows all Salesforce users, not just data scientists, to surface predictions directly in the context of their business. With as little friction as possible, Salesforce Einstein discovers your company's most important business insights, predicts what will happen next, recommends the next best action to take, and ultimately automates certain tasks to free up your users' time. Powered by advanced machine learning, deep learning, predictive analytics, natural language processing, and smart data discovery, it allows your company's customer processes, workflows, and interactions to become instantly become smarter and more predictive. This AI innovation is in a highly scalable on the Salesforce low code cloud platform

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Agenda

- Redpath
- AI for Business
- Salesforce Einstein AI
- Salesforce Einstein AI Demo Video
- Questions

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Redpath Consulting Group

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- Established 2008
- 10 years of growth
- 330+ Clients
- Customer Relationship Management (CRM) Specialists
- 78 Salesforce Certifications 1,365 Trailhead Badges



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What is Artificial Intelligence (AI)?

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Einstein AI Demo 04

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Concept of having machines “Think like humans”

- Reasoning (Algorithms)
- Planning (Task Automation)
- Learning (Machine Learning)
- Understanding Language (Natural Language Processing - NLP)

The brains behind AI is a technology called machine learning

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Why is AI such a hot topic?

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Many major enhancements have aligned to realize AI

- More Processing Power (1 Trillion fold faster in 60 years)
- More Affordable Processing Power
- More data to analyze as businesses capture more digital engagement interactions
- More AI in consumer applications, improving user experiences.

Customers now expect businesses to provide these experiences

Question: What consumer AI experiences have you seen?

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Why do I need AI in my CRM?

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Business application users want to use their data to provide fast, smart, personalized predictions, forecasts, and recommendations.

- **Predictive Lead Scoring** - Likelihood it will convert to a deal
- **Forecasting** - to predict quarterly deal closures and know ahead of time whether you will meet your sales quota
- **Recommendations** - What Lead to work first, what opportunity is most likely to close, what products to offer the customer next

Question: *What do Reports/Dashboards show you?*

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What are the main AI challenges?

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Traditionally to create an AI capability you need:

- **Expensive Data Scientists** and Engineers
- **Massive amounts of Data** to analyze to build complex models
- **Labor Intensive data extraction** and data preparation
- **Huge Technology Infrastructure** to host all the data and processing
- Projects with **long timeframes** and **cost prohibitive budgets**

Question: *But what if AI use was democratized to allow both data scientists and business users to access to cutting edge AI capabilities faster and with*

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Einstein makes your Sales Team smarter

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- **Lead and Opportunity Scoring** - Prioritize
- **Account and Opportunity Insights** - Act on knowledge
- **Activity Capture and Automated Contacts** - Prospect smarter
- **Salesforce Inbox** - Work in your calendar and email inbox
- **Sales Analytics** - See what happened and what is likely to happen
- **Einstein Voice** - Voice activated briefings, and actions from Siri, Google or

Alexa.
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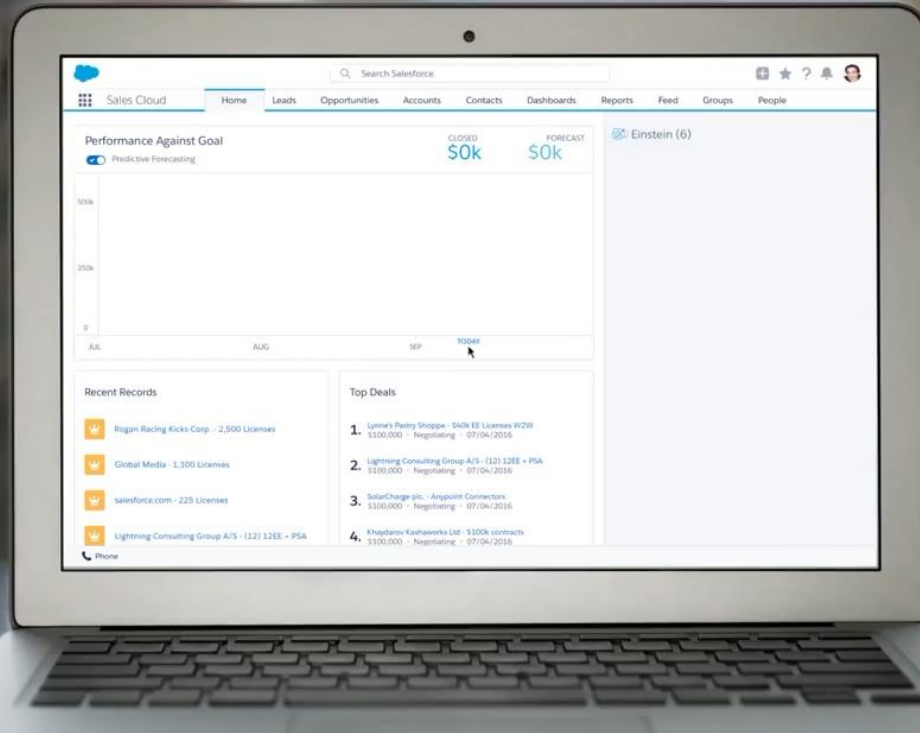
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Sales Cloud Einstein

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Einstein makes your Marketing smarter

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- **Recommendations** - Increase order size and conversions
- **Vision for Social** - Recognize images in social channels for brand sentiment
- **Engagement Scoring** - Predict consumer engagement with your messages
- **Journey Insights** - Discover optimal channels and paths to conversion

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Einstein makes your Community smart

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- **Recommendations** - Make resources easier to find and make informed suggestions
- **Experts** - Help members find certified experts based on topics
- **Feed Insights** - Improve engagement by identifying and promoting popular content and posts
- **Feed Search** - Get top ranked answers to searches based on relevance and engagement

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Service Cloud Einstein BOTS

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Einstein uses your data to be smarter

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ANALYTICS

- **Discovery** - Find patterns in your data so you can predict future trends and you know the next best actions for Sales, Marketing and service

PLATFORM

- **Custom Apps** - Create smarter more predictive custom applications that leverage your data in the Salesforce Platform. Data scientist is optional
- **Language** - Classify underlying intent and sentiment in a body of text classify how a customer feels and what they might need
- **Discovery** - Unlock productivity and discover relevant patterns in your data with AI powered insights and recommendations

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Einstein allows Commerce to be smart

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- **Commerce Insights** - Reveal purchasing behavior and optimize product bundles
- **Predictive Sort** - Personalize search and category pages
- **Product Recommendations** - Across web and mobile to boost revenue per visitor
- **Search Dictionaries** - Eliminate gaps in dictionaries so there are never any “no results”

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The World of Salesforc e Einstein

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Einstein make Developers Smarter

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- **Voice Bots** - Build your own smart assistants declaratively using your own data and Alexa and Google
- **Smarter Apps with the Integrated REST APIs** - Image Recognition and Natural Language Processing,
- **APEX or Heroku** - Create scalable AI enabled business Apps
- **Prediction Builder** - Use any Salesforce field or Object to predict outcomes
- **Analytics** - Build real-time analytics and Dashboards using Salesforce Analytics Query Language (SAQL)

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Questions?

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