SFHC - AI Associate Cert Study Guide

AI Capabilities in CRM: 8%

- **Einstein Bots:** allow you to build a smart assistant into your customers' channels like chat, messaging or voice. Einstein Bots use Natural Language Processing (NLP) to provide instant help for customers by answering common questions or gathering the right information to handoff more complex questions to the right agents.
- **Einstein Prediction Builder:** is a simple point-click wizard that allows you to make custom predictions on your non-encrypted Salesforce data
    - Is this *zip code* a good opportunity for my business?
    - Will this *customer* attrit?
- **Einstein Next Best Action:** allows you to use rules-based and predictive models to provide anyone in your business with intelligent, contextual recommendations and offers
- **Einstein Discovery:** allows you to get a more full understanding of relevant patterns on all of the data in your company
- **Generative AI with Einstein:** allows businesses to generate personalized and relevant content by grounding large language models (LLMs) in their CRM data safely and securely using conversational intelligence.

AI Fundamentals: 17%

- **Numeric Predictions:** Is this customer likely to renew their subscription? Are you at risk for a medical condition? Will there be high demand on the power grid this evening? And as a consumer you're probably already affected by these kinds of numeric predictions, even more than you realize.
- **Classifications:** Is this plant edible or poisonous? Is that email legitimate or a phishing attempt? Classification is often the first step in taking some kind of action, making it an incredibly valuable skill. Financial institutions need to flag fraudulent transactions. Medical professionals must diagnose illnesses. Social media platforms want to identify toxic comments.
- **Robotic Navigation:** Some AIs excel at navigating a changing environment. EX: businesses need to produce & deliver products to their customers every day. Lots of market conditions play a role in how quickly that gets done: materials availability, manufacturing capacity, existing inventory, etc. AI can optimize the supply chain even while conditions are changing.
- **Language Processing:** ChatGPT is one of the most capable AIs built to interpret everyday language and act on it in some meaningful way. This is known in the industry as **natural language processing**, or just NLP. NLP is a huge part of **generative AI**, a subcategory of AI that takes words and turns them into unique images, sounds, and of course other words.

Data for AI: 36%

Elements of Data Quality	
High Volume	A large amount of relevant, available data means that there's a better chance you'll have what you need to answer your questions.
Historical	Data that goes back in time allows you to see how the present situation arose due to patterns that have arisen over time, such as looking at sales trends over the last 10 years to see increases or decreases.
Consistent	As things change, data should be adjusted for consistency. Salary and price data adjusted for inflation is a good example of this.
Multivariate	Data should contain both quantitative (numerically measurable) and qualitative (characteristic, not numerically measurable) variables. The more variables in the data, the more you can discover from it.
Atomic	The more finely detailed the data, the more you are able to examine it at various levels of detail.
Clean	For data to be useful, it should be accurate, complete, and free from errors.
Clear	Data should be written in terms that can be easily understood, not in code. e.g. housing values "single family"is much easier to understand than "1Fam"
Dimensionally Structured	An accessible way to structure data is to organize it into two types: Dimensions (qualitative values) and Measures (quantitative values). This is the organizational structure Tableau uses when interpreting data.
Richly Segmented	Groups, based on similar characteristics, should be built into data for easier analysis. For example, data about movies could be grouped by genre (action, science fiction, romance, comedy, and so on).
Of Known Pedigree	In order to trust the data, you should know its background—where it comes from and how it has since been altered.

Ethical Considerations of AI: 39%

Trusted AI Principles:

1. **Responsible:** We strive to safeguard human rights, to protect the data we are trusted with, observe scientific standards and enforce policies against abuse. We expect our customers to use our AI responsibly, and in compliance with their agreements with us.
2. **Accountable:** We believe in holding ourselves accountable to our customers, partners, and society. We will seek independent feedback for continuous improvement of our practice and policies and work to mitigate harm to customers and consumers.
3. **Transparent:** We strive to ensure our customers understand the "why" behind each AI-driven recommendation and prediction so they can make informed decisions, identify unintended outcomes and mitigate harm.
4. **Empowering:** We believe AI is best utilized when paired with human ability, augmenting people, and enabling them to make better decisions. We aspire to create technology that empowers everyone to be more productive and drive greater impact within their organizations.
5. **Inclusive:** AI should improve the human condition and represent the values of all those impacted, not just the creators. We will advance diversity, promote equality, and foster equity through AI.