Six-step approach to scaling up Salesforce Einstein AI for improved customer experience

Today, you can visit many of the most popular e-commerce websites, and a list of customized product recommendations will be displayed for you to choose from. You can also begin typing into Google's search bar and what you were thinking will more often than not be automatically populated before you're finished. Your favorite music streaming service can even recommend songs based on your preferences and listening history.

These are just some examples of how AI is enhancing our lives today and improving the overall customer experience for brands. Best of all, the technology is just getting started! As machine learning continues to grow in leaps and bounds, AI will only continue to enhance our everyday lives. How can your business make use of this technology and begin utilizing artificial intelligence to improve the customer experience? Well, one way is with Salesforce's Einstein.

Released in 2016, Einstein taps into AI-technology and is fueled by all the customer data that lives within your CRM. When properly configured and used, Einstein can greatly enhance the way your company understands and interacts with your customers. Salesforce Einstein is like having a world-class data scientist within your CRM, who can provide you with insights, predictions, and recommendations based on the information that's available on demand. Available with all the Salesforce applications including Marketing Cloud, Sales Cloud, Service Cloud, etc. Einstein can assist just about every individual within your organization that uses the Salesforce product. Out-of-the-box, Einstein is a very powerful tool for your Salesforce ecosystem however, with the proper planning beforehand, you can make the most of the new-age technology.

Six-step approach to scaling up Salesforce Einstein AI

1. **Plan:** During this first initial step, organizations should identify, define, and prioritize Einstein use cases and review the quality and relevance of data that will be used to feed the AI.

2. **Design:** Design AI for customer experience with Einstein. The goal of this step is to define the Salesforce Customer 360 and/or Einstein features to activate or extend within your existing Salesforce customer platform.

3. **Deliver:** Activate, connect, and deploy Einstein features in your Salesforce ecosystem.

4. **Enable:** Drive adoption for Einstein use cases across your organization. In order to get an understanding of the full impact of AI, you should train employees and encourage buy-in with the new set of tools and analytics.

5. **Operate**: Deploy and run Einstein features and measure the business value and impact on the experiences delivered.

6. **Optimize:** Make informed judgements based on feedback and metrics and maintain a mindset of continuous improvement based on previous results and metrics while Einstein is enabled.

Capgemini's expertise with configuring and enabling Einstein

During Dreamforce 2018, Salesforce's premier annual event, Capgemini was given the Salesforce Partner Innovation Award for Cloud Solutions for our work with Siemens Postal, Parcel & Airport Logistics, a provider of innovative products and solutions in the parcel post and airport logistics industries.

Capgemini designed an Einstein Analytics app to track sales performance, forecast and pipeline trends. A major challenge was coming up with ways to visualize sales versus quota without directly assigning quota amounts to individual SPPAL personnel which is restricted by German law. This app shows forecasts using a proprietary weighted average calculated in Einstein and uses predictive analytics throughout. The result is an interactive predictive analytics tool used by all levels of the management hierarchy at SPPAL – available on smart phones, tablets and even smart watches.

Join Capgemini at Dreamforce 2019

We invite you to join us at Dreamforce taking place in San Francisco, CA on November 19–22, 2019.

Engage with our team of Salesforce experts who will be on-hand at the Innovator Sponsor booth #1718. Attendees can also visit us at our Retail showcase lounge #1724.

Additional event details can be found here: https://www.capgemini.com/events/dreamforce-2019/