



# Scale Your Customer Service with AI-Powered Chatbots

**Matt Kaufman**  
CEO, Mambo Merge  
He / Him



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current and potential litigation involving us or our industry, including litigation involving acquired entities, and the resolution or settlement thereof; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including any efforts to expand our services; the success of our strategy of acquiring or making investments in complementary businesses, joint ventures, services, technologies and intellectual property rights; our ability to complete, on a timely basis or at all, announced transactions; our ability to realize the benefits from acquisitions, strategic partnerships, joint ventures and investments, and successfully integrate acquired businesses and technologies; our ability to compete in the markets in which we participate; the success of our business strategy and our plan to build our business, including our strategy to be a leading provider of enterprise cloud computing applications and platforms; our ability to execute our business plans; our ability to continue to grow unearned revenue and remaining performance obligation; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; our ability to limit customer attrition and costs related to those efforts; the success of our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations, including as a result of acquisitions; our ability to preserve our workplace culture, including as a result of our decisions regarding our current and future office environments or remote work policies; our dependency on the development and maintenance of the infrastructure of the Internet; our real estate and office facilities strategy and related costs and uncertainties; fluctuations in, and our ability to predict, our operating results and cash flows; the variability in our results arising from the accounting for term license revenue products; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; the impact of future gains or losses from our strategic investment portfolio, including gains or losses from overall market conditions that may affect the publicly traded companies within our strategic investment portfolio; our ability to protect our intellectual property rights; our ability to maintain and enhance our brands; the impact of foreign currency exchange rate and interest rate fluctuations on our results; the valuation of our deferred tax assets and the release of related valuation allowances; the potential availability of additional tax assets in the future; the impact of new accounting pronouncements and tax laws; uncertainties affecting our ability to estimate our tax rate; uncertainties regarding our tax obligations in connection with potential jurisdictional transfers of intellectual property, including the tax rate, the timing of transfers and the value of such transferred intellectual property; uncertainties regarding the effect of general economic, business and market conditions, including inflationary pressures, general economic downturn or recession, market volatility, increasing interest rates, changes in monetary policy and the prospect of a shutdown of the U.S. federal government; the potential impact of financial institution instability; the impact of geopolitical events, including the ongoing armed conflict in Europe; uncertainties regarding the impact of expensing stock options and other equity awards; the sufficiency of our capital resources; our ability to execute our share repurchase program; our ability to comply with our debt covenants and lease obligations; the impact of climate change, natural disasters and actual or threatened public health emergencies; expected benefits of and timing of completion of the restructuring plan and the expected costs and charges of the restructuring plan, including, among other things, the risk that the restructuring costs and charges may be greater than we anticipate, our restructuring efforts may adversely affect our internal programs and ability to recruit and retain skilled and motivated personnel, our restructuring efforts may be distracting to employees and management, our restructuring efforts may negatively impact our business operations and reputation with or ability to serve customers, and our restructuring efforts may not generate their intended benefits to the extent or as quickly as anticipated; and our ability to achieve our aspirations, goals and projections related to our environmental, social and governance initiatives, including our ability to comply with emerging corporate responsibility regulations.

# Download this Slide Deck

Instead of taking pictures on every slide, download this slide deck for future use





# Thank You



# Agenda

A 100% Human-made Presentation



## Background Information

Stuff you should know

## Configuration Steps

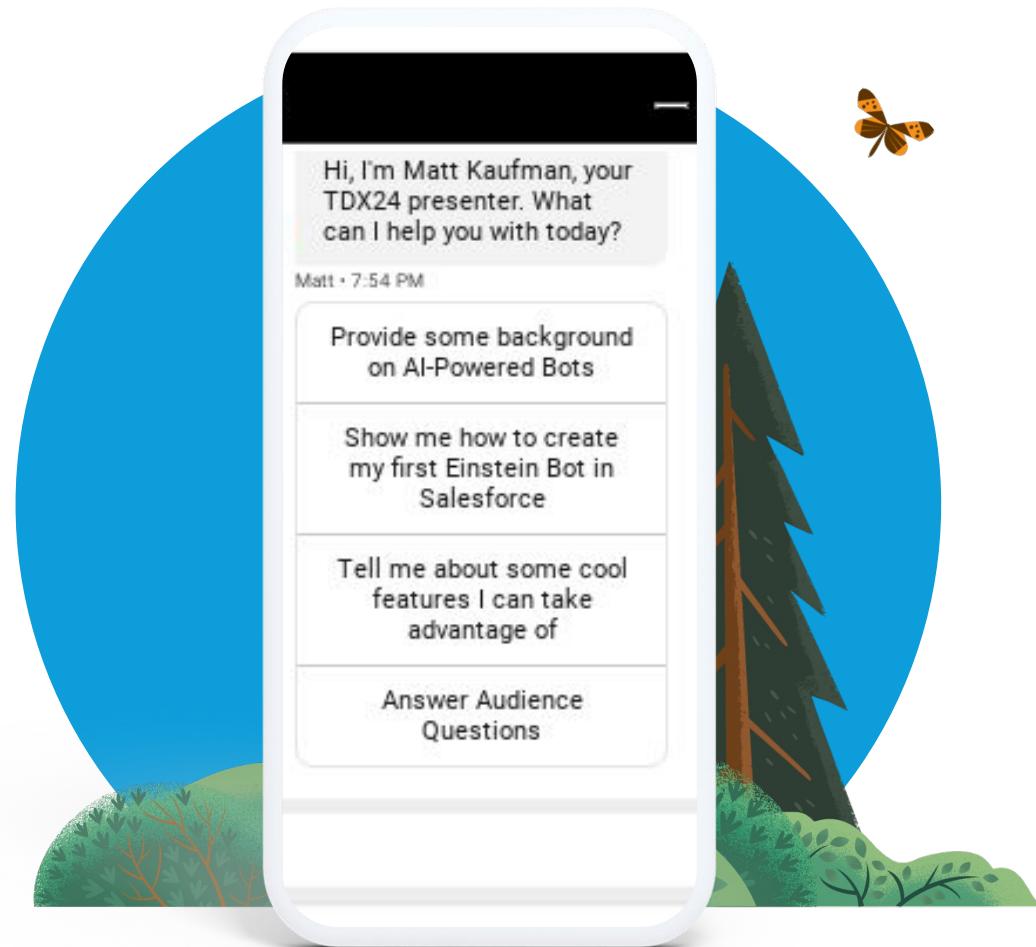
Creating your first bot

## Cool Stuff

Incorporating data

## Q&A

Ask me anything



# AI-Powered Bots

An introduction



# Why Chatbots?

Just in case you ended up in the wrong session



## Chatbots are not a fad, they are proven to:

- Deflect inbound calls and emails, saving time and money
- Provide a consistent customer experience 24/7 x 365
- Are a preferred communication medium when built well
- Facilitate faster handoffs to humans
- Instantly scale with your needs



# Chatbot Types

## Legacy vs AI Powered

### Legacy Chatbots

- First created in the 1960s
- Cross reference a list of keywords to a customer's statement or question
- Respond with pre-written responses

### AI-Powered Chatbots

- Use large language models to interpret statements and questions
- Respond in a human sounding voice with variations on wording
- Can present logical answers based on training material

# Setup Terminology to learn

Know before you click



## Intent

An intent is a supported reason why your customer is contacting you.

For example, you may want to support customers asking for their order status.

## Utterance

An utterance is phrase you support a customer to use to derive their Intent.

For example, a customer may say “What’s my order status” or “Where’s my order?”

## Dialog

A dialog is a defined part of conversation your bot uses in a known situation.

For example, when a customer asks to speak to an agent, your Dialog may be “as you wish” or “why, what’s he got that I don’t”

## Entity

An entity is a piece of information that you need to collect in order to process a customer’s request.

For example, the customer’s Order Number is the entity needed to provide their Order Status.





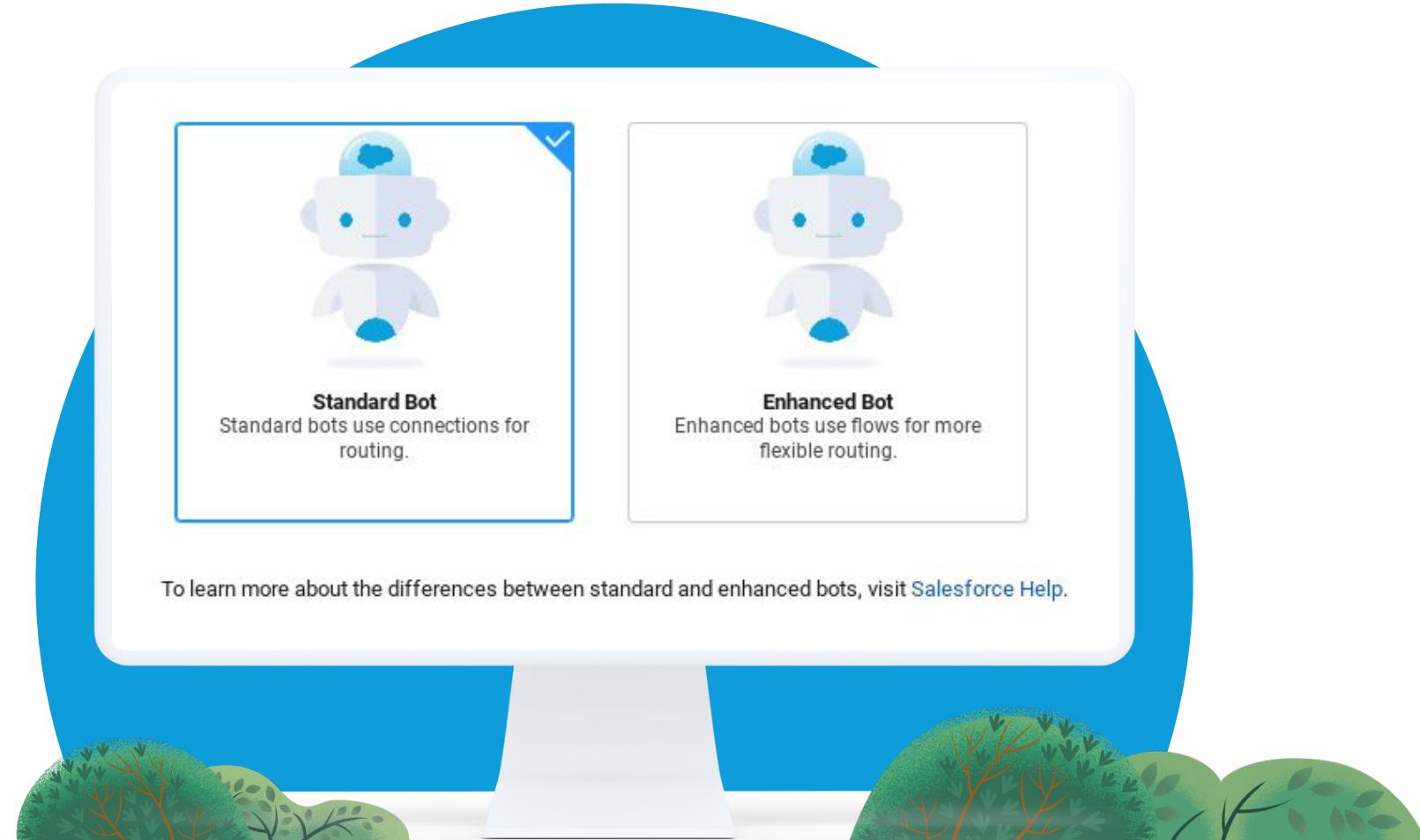
# You're ready

Let's create a bot



# Create your first bot

Click Setup | Einstein Bots



Requires purchasing appropriate licenses

# Enhanced vs Standard

More Features = More Setup Work



## Enhanced Bots

- Support In-App, Web, Facebook, WhatsApp, Slack and more
- Dynamically route based on rules in Omni-Channel Flow
- Supports Rich Content including files, links, time selector, dynamic questions.
- Can only be cloned as an enhanced bot

## Standard bots

- Can be based on the Intro Template
- **Can be cloned as a standard or as an enhanced bot**



# Start from Scratch vs Intro Template

Fast and even Faster



## Start from Scratch

Allows you to type in up to 3 Menu Items as your initial Dialog options

## Intro Template

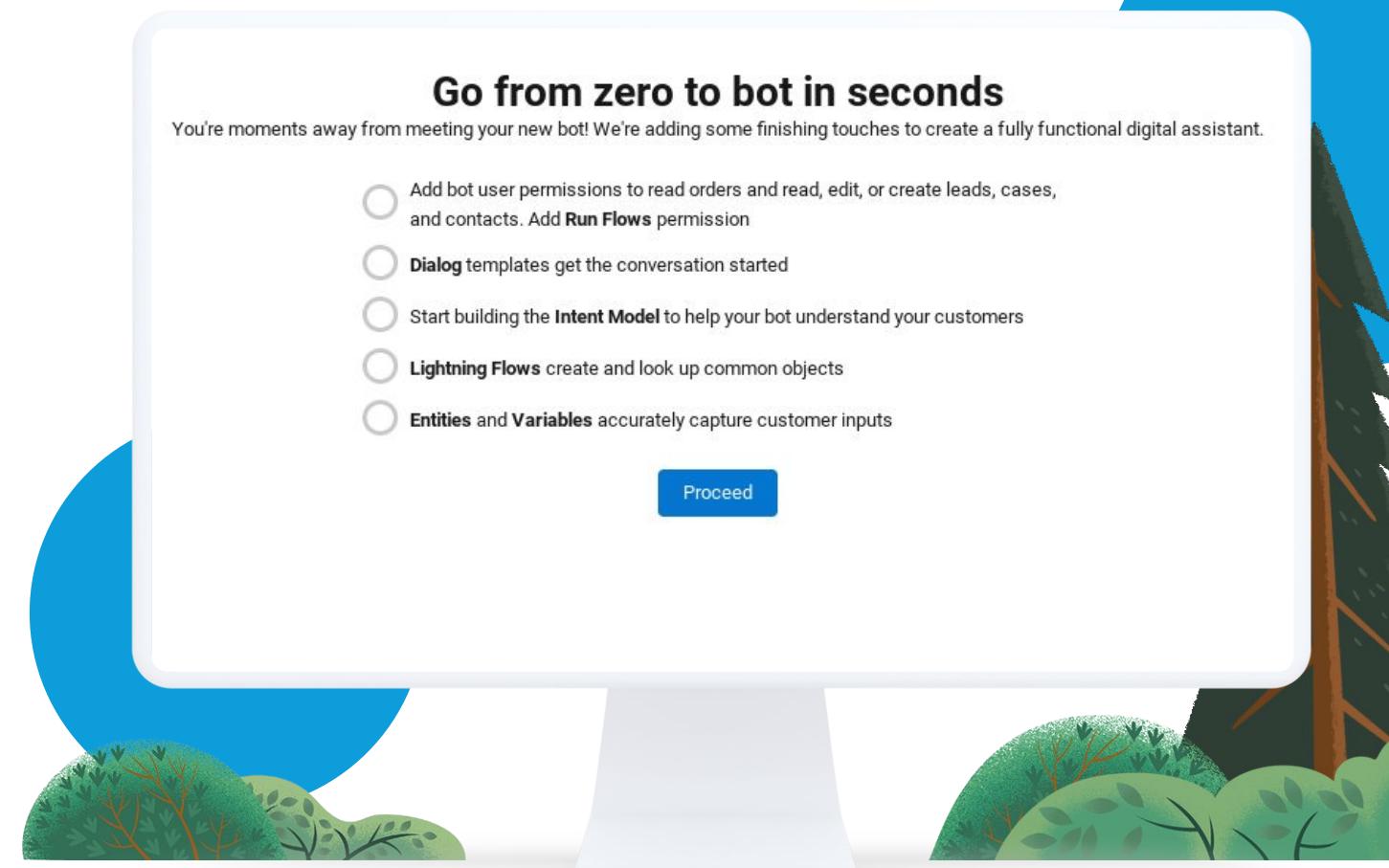
Let's you choose from 4 hard coded Menu Items as your initial Dialog options

## Only the one screen is different

The setup wizards are almost identical

## The results are very different

Intro Template includes multiple Dialogs already configured for you. You can activate it right away or personalize it first.





# Configure your Intents and Dialogs

Choose your own adventure



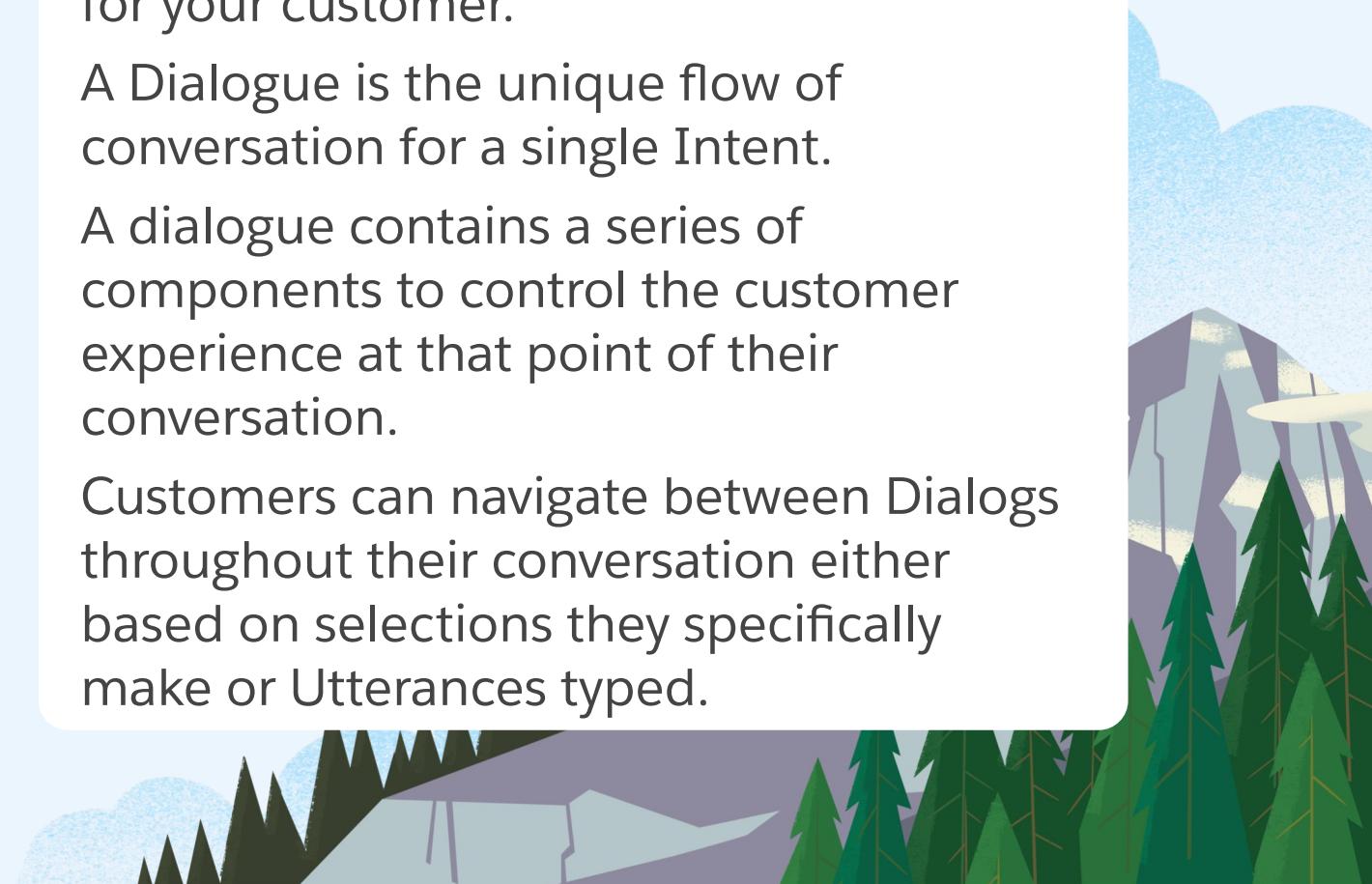
A screenshot of the Salesforce interface for configuring Dialogs. On the left, a sidebar lists various intents: Speak with a sales person, Get help from support, Pay my bill (which is selected and highlighted in blue), Welcome, Main Menu, Transfer To Agent, End Chat, Confused, No Agent, and Error Handler. The main area shows a list titled "Dialogs" with a search bar and a plus sign button. Below the search bar, it says "10 Items". A single item is listed: "Pay my bill" with a "Detail" button. To the right of the main area, there's a vertical sidebar with icons for Search, Message, Question, and Help.

Each Intent is a purpose your Bot serves for your customer.

A Dialogue is the unique flow of conversation for a single Intent.

A dialogue contains a series of components to control the customer experience at that point of their conversation.

Customers can navigate between Dialogs throughout their conversation either based on selections they specifically make or Utterances typed.



# Dialog Steps

## Available Component Types



### Messages

Predefined statements that your Bot will display.

They can make the interaction more conversational and allow you to set the voice of your Bot

### Questions

Questions your customer needs to answer to supply your Bot the data it needs.

Static Questions have their answers predefined.

Dynamic Questions can generate their answers from an Action.

Questions are not open ended.

### Actions

Programmatic actions that can be run within a given Dialog

Allow you to run Apex Code, connect to an external service, run a Flow, search records, send emails, and more

### Rules

Logic controllers for your Dialog

Allow you to change language, set and clear variables, redirect to another dialog, transfer, send a message, and end the chat.



# Putting the AI in your Bot

Einstein adds NLP to your Intents



## Without Utterances

Your Customer must select what they want your Bot to help them with in order to proceed to the right Dialog.

## With Utterances Only

Your Customer must type in exactly the same Utterance that you entered for your Bot to match them to an Intent

## With Einstein On

Your Bot uses Natural Language Processing (NLP) to understand the Utterances you configured and also to understand the concept a Customer is trying to express. These are compared to determine the Intent most likely matching the Customer's request.

An illustration of a brown bear wearing a white hoodie, holding a white circle, standing next to a computer monitor. The monitor displays the Einstein AI interface for configuring a bot dialog. The dialog is titled 'Pay my bill' and has tabs for 'Dialog Details' and 'Dialog Intent'. Under 'Intent Name', it says 'Pay my bill' and under 'Dialog Description', it says 'Allows the customer to receive a...'. A toggle switch labeled 'Einstein' is set to 'On'. In the 'Utterances (2)' section, there is a table with one row: Utterance 'I'd like to make a payment' added on Feb 21, 2024. The background features stylized green hills and trees.

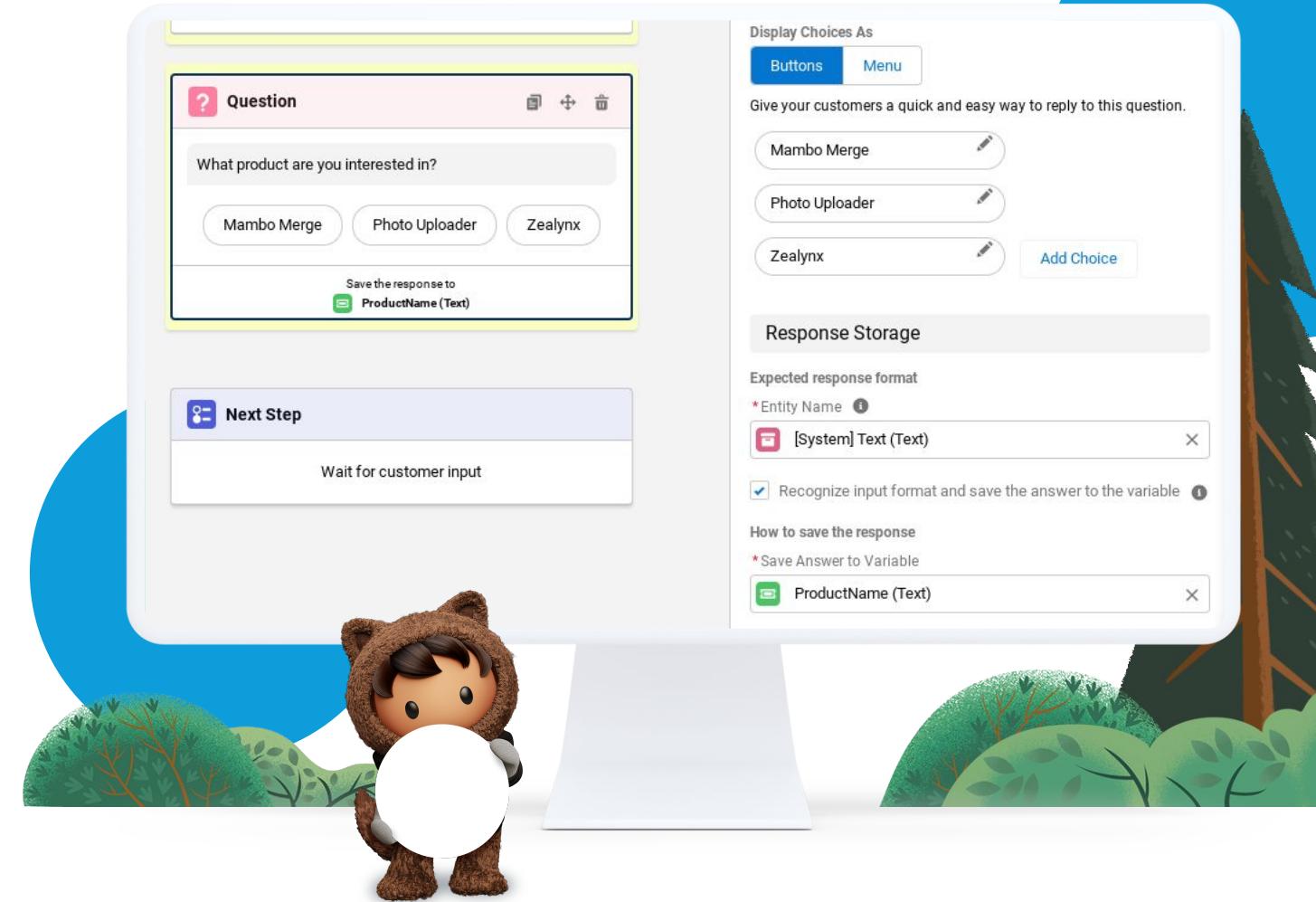
# Making your Bot a good listener

Add AI-Processing to your Question Logic

**Questions allow your Bot to gather needed details by prompting your customer to click a buttons or menu option.**

**Your Bot can be configured to skip a question if it already knows the answer.**

**Check the “Recognize input format and save the answer to the variable”**



# Make your Bot an Action Hero

Actions enable your bot to work in your Salesforce



## Add Action Components

Add actions to your Dialog to have your Bot do more than just chat with your Customer.

## Standard Actions

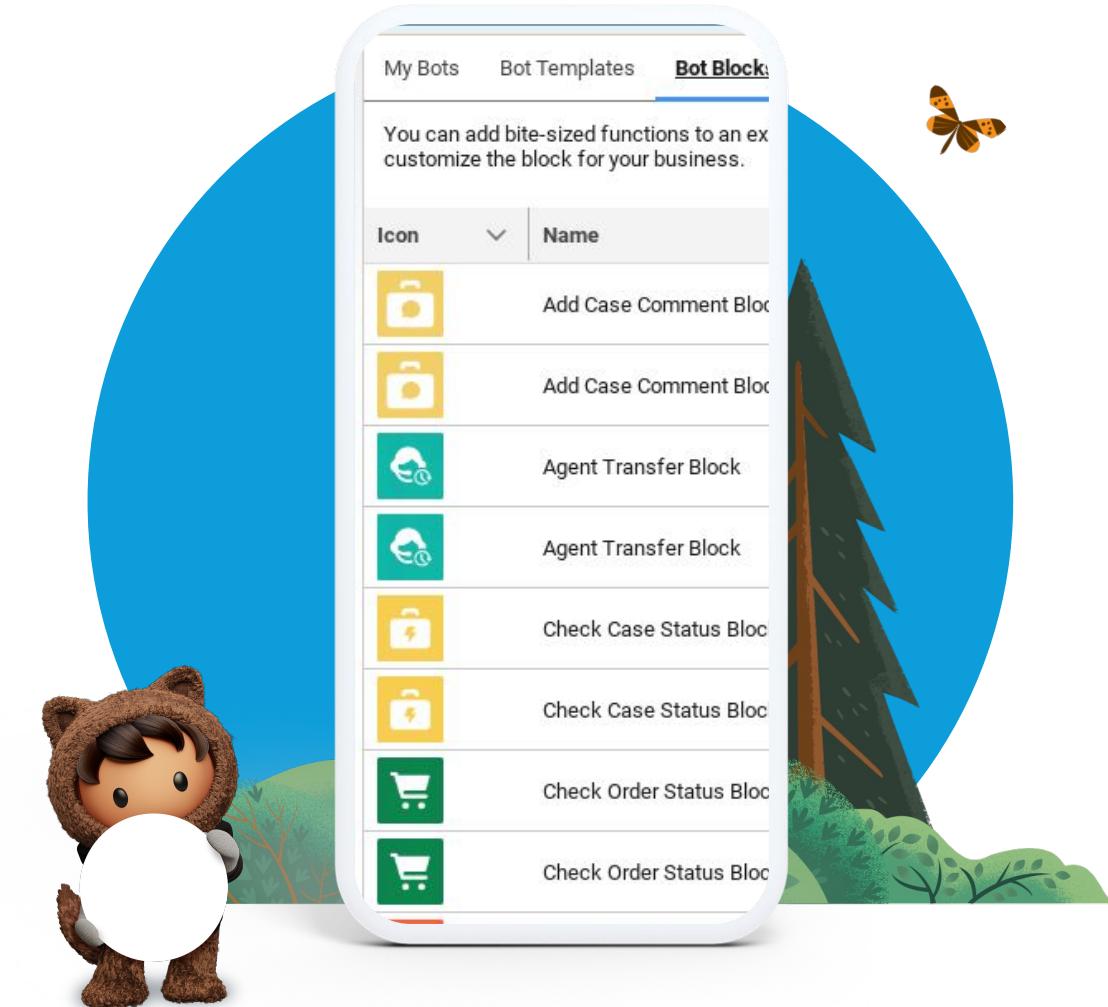
Standard Actions are prebuilt functions that are commonly used functions, like sending a Slack message or an email.

## Bot blocks are reusable Flows

Salesforce also includes Bot Blocks for common sales and support use cases like creating Cases, looking up Orders, and more.

## Create your own

You can create your own Flows, Apex, Bot Blocks and more to reuse in your Bots.



My Bots    Bot Templates    **Bot Blocks**

You can add bite-sized functions to an existing flow or customize the block for your business.

Icon	Name
	Add Case Comment Block
	Add Case Comment Block
	Agent Transfer Block
	Agent Transfer Block
	Check Case Status Block
	Check Case Status Block
	Check Order Status Block
	Check Order Status Block

# Activate your bot

Add code snippet to your website



## Grab your code snippet

This code snippet connects your website with embedded chat. When you add the snippet to your website, a chat button is displayed to let customers request a chat.

### Chat Code Snippet

Paste this code before the closing body tag (</body>) for each page in <https://mambomerge.com> where you want to make chat available. Don't place the code in your header.

```
<style type='text/css'>
    .embeddedServiceHelpButton .helpButton .uiButton {
        background-color: #005290;
        font-family: "Arial", sans-serif;
    }
    .embeddedServiceHelpButton .helpButton .uiButton:focus {
        outline: 1px solid #005290;
    }
```

# Rinse and Repeat

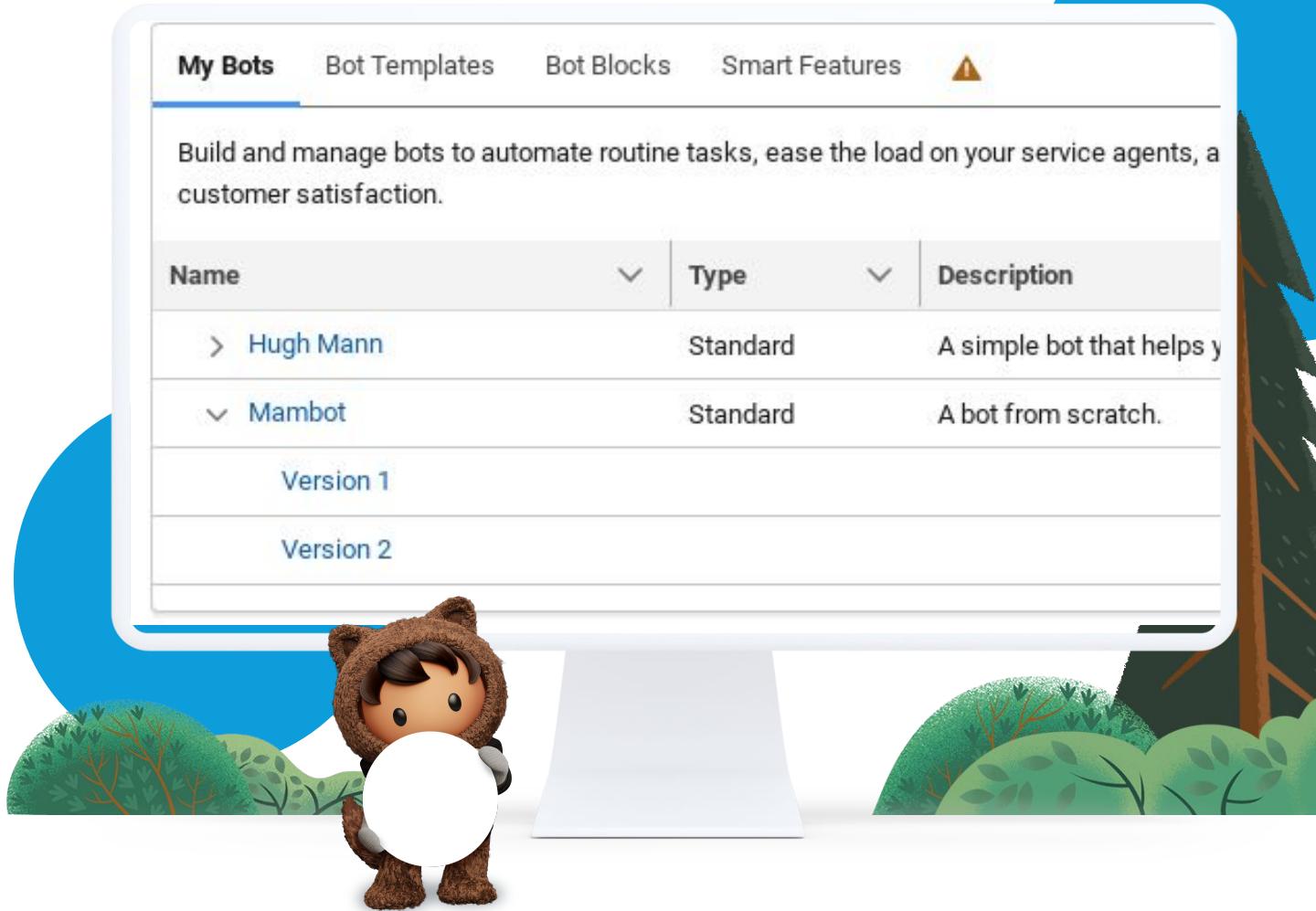
Building Bots is an Iterative process

Just like with Flow Builder, you cannot edit an Active Bot.

Instead Clone and create a new Version of your Bot.

This allows you to keep a history of your Bot configuration and revert to an earlier version if necessary.

Your customers change over time, so your Bots should too.





# Some Cool Features

Turn your Bot up to 11



# Einstein Bots Assessor

Calculate your ROI



The image shows a white computer monitor displaying a web-based application titled "ROI". The application is designed to calculate the return on investment for using Einstein Bots. It includes a summary section with cost savings information and a form with three input fields for user data. The monitor is positioned centrally, surrounded by stylized green bushes at the bottom.

**Estimated cost savings per month using Einstein Bots**

\$5,130

[Read More](#)

**ROI**

Einstein Bots helps you engage customers and quickly resolve common service questions by harnessing the power of AI. Start with understanding how much Einstein Bots will contribute to your business before building a bot. You can easily estimate ROI by telling us about your current support process without spending time to create a report.

**Chat channels** refers to all messaging channels such as Chat, SMS, WhatsApp, etc.

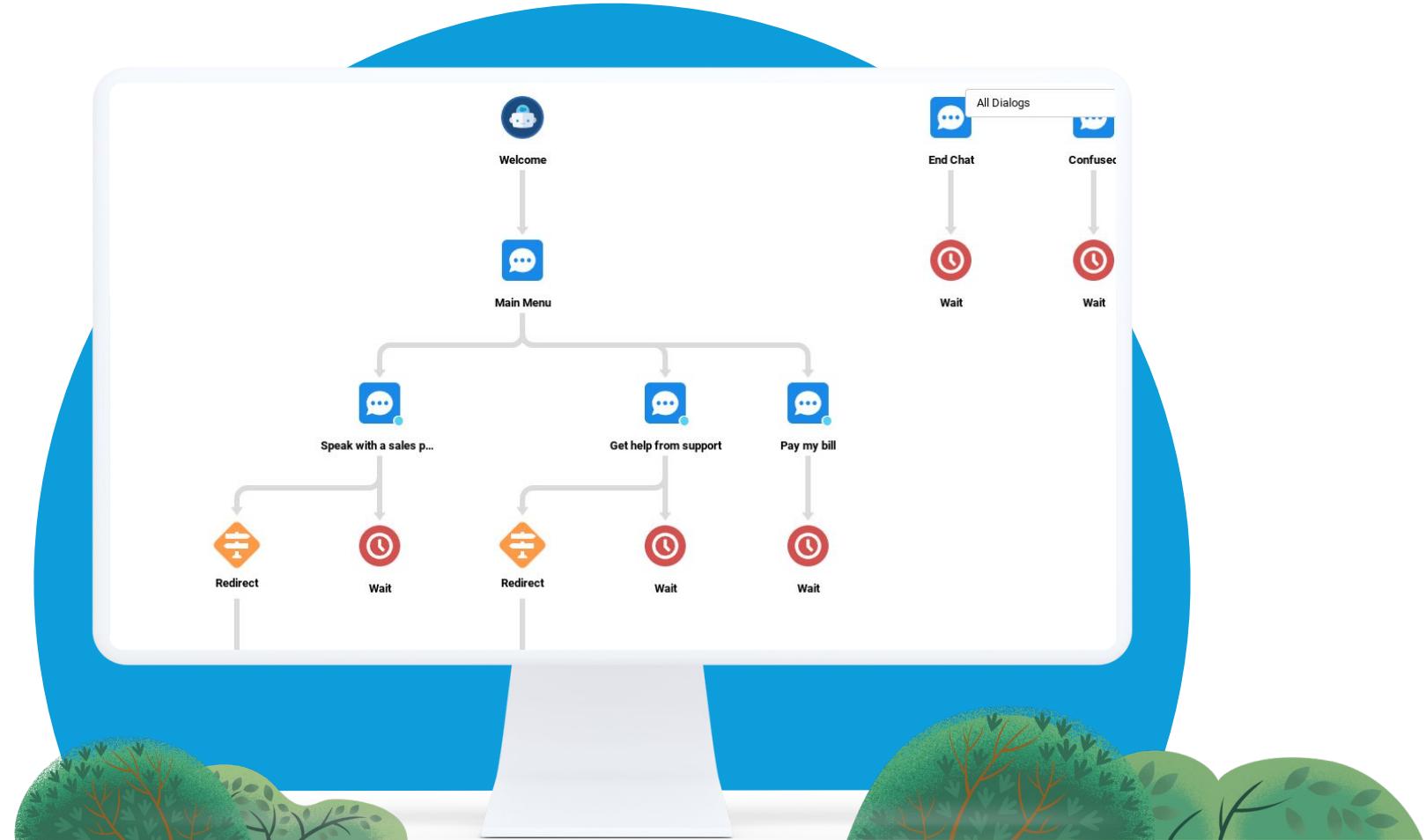
\* How many cases do you receive across all channels include chat on a monthly basis?

\* What is your average time to resolve a case through all channels by an agent in minutes?  
 minutes

\* What is your average hourly cost to resolve a case through all channels by an agent?  
\$

# Visualize your Bot

## Map Screen



# Put your Knowledge Base to work

## Article Answers

**Article Answers is a Smart Feature  
that enables your Bot to go beyond  
its predefined intents**

**Interpret customer requests and  
provide dynamic responses based  
on the data in your knowledge  
articles**

**Enable your support reps to  
improve your Bot's performance  
without changing its configuration**



Article Answers uses knowledge articles to deliver responses. Select mappings for each field type. Only published articles with values in all these fields are included.

**Select which field trains the bot to find answers**  
The bot compares text in this field to the customer request.

\* Question Field

Body (Body\_c)

**Select which field the bot uses to deliver answers**  
The bot sends the content of this field as a response.

\* Answer Field

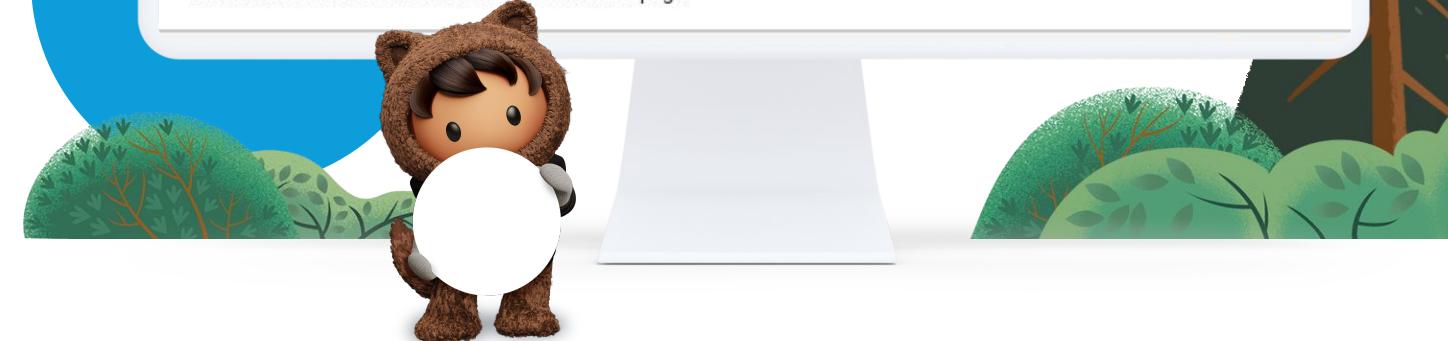
HTML Body (HTML\_Body\_c)

**Select which field represents the article title**  
The bot displays this field when there are multiple results.

\* Title Field

Title (Title)

It can take a few hours to finish the build. Check the Bots Setup Page for progress updates. When it's ready, configure Article Answers for each bot on the Bot Overview page.



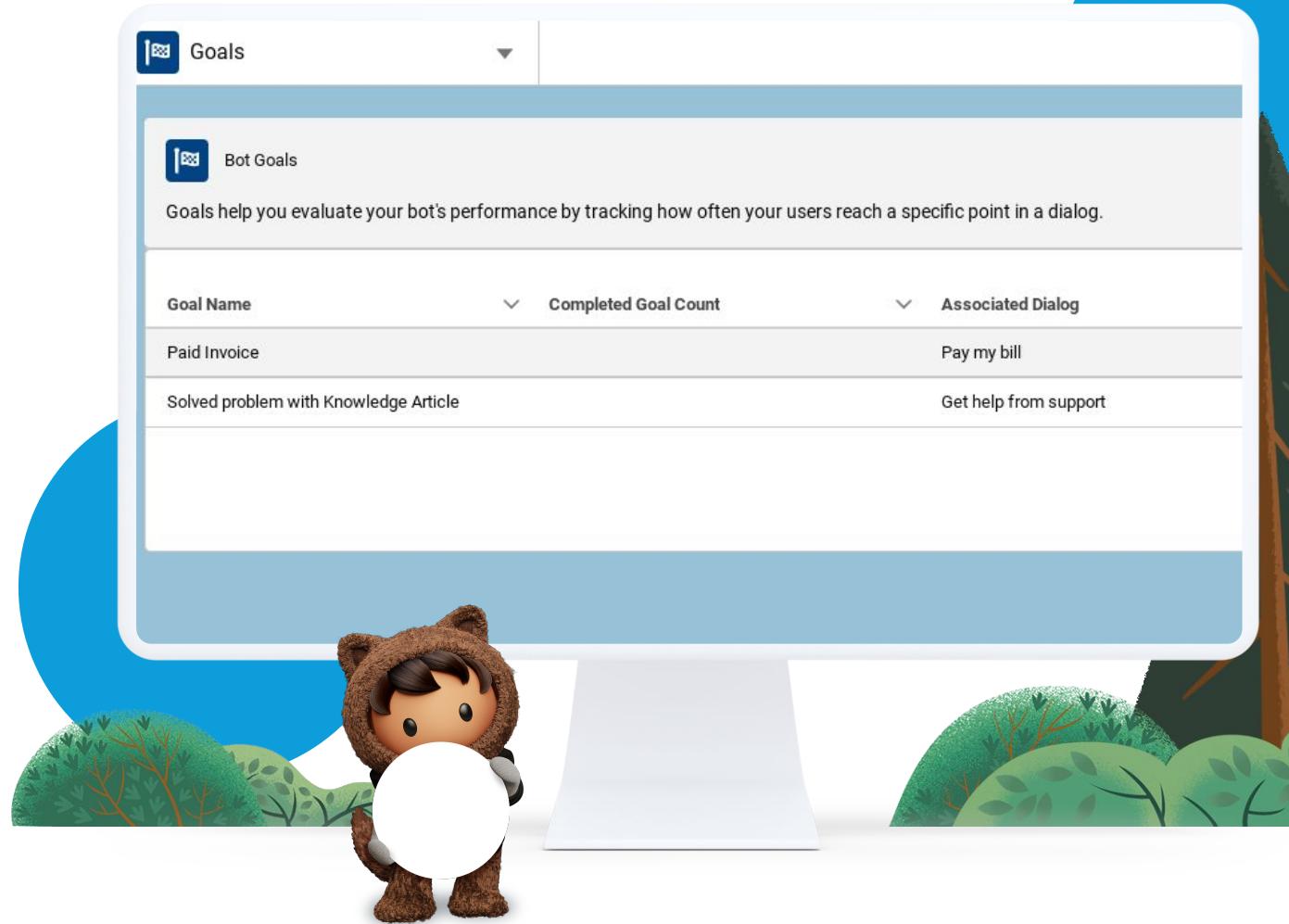
# Meet your Goals

Create Goals to track outcomes

**Create Goals to define points in a Dialog.**

**Salesforce tracks when a Customer reaches one of your Goals.**

**You can easily measure how many times a Customer received the solution to their problem, filled out a form, or even paid their bill.**



# Making the leap

## Migrating to Enhanced Bots



When you're ready, you can clone your existing Bot into an Enhanced Bot or create one from scratch.

Leverage business rules to dynamically route conversations with Omni-Channel Flow.

Support customers uploading and downloading files.

Support Facebook, WhatsApp and more



# Tips for Success

## Before you begin your Bot journey



### Familiarize yourself with Flow Builder

The Einstein Bot Builder user interface is extremely similar to the Flow Builder UI.

The more comfortable you are creating Flows, the easier it will be to create Bots.

### Compile data

Run reports to determine the most common reasons customers contact you

Talk to the humans on the front line to find out what they need to know to help your customers

Document solutions to the most common issues

Quantify the cost of the way you currently operate

### Plan, Plan, Plan

Plan an initial rollout for simple use cases

Plan who and how you'll test your Bot for the initial and subsequent rollouts

Plan how you'll measure the success of your bot and the money it saves you

Plan the frequency you'll rollout changes to your bots



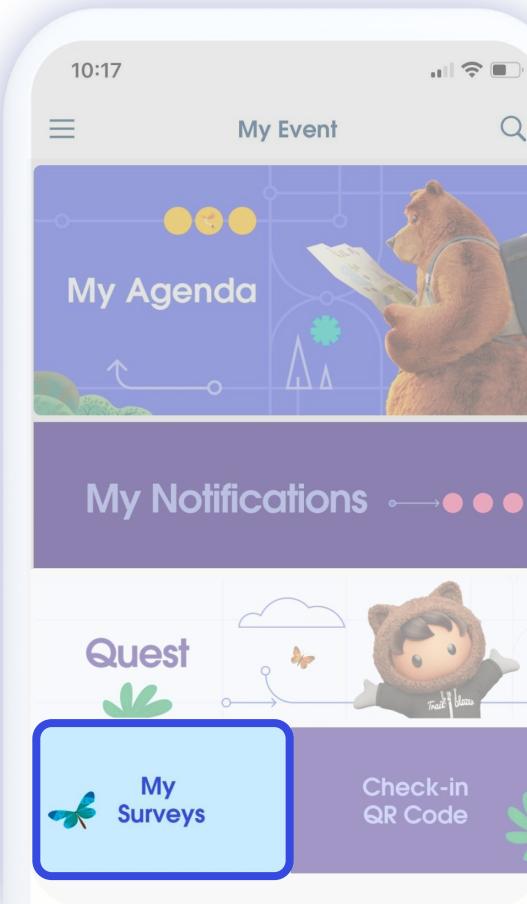
# Coffee on us.

The first 500 Trailblazers to provide feedback on this event will receive a \$5 Starbucks gift card.

- 1 Ensure you have the Salesforce Events app downloaded.
- 2 Give us feedback!
- 3 On Day 2, present the completed (1) Event Survey page and (4) Session Surveys at Badge pickup to redeem.\*



\*Restrictions apply. See terms and conditions at [sforce.co/survey-terms](https://sforce.co/survey-terms).



# Q&A



# Thank You

