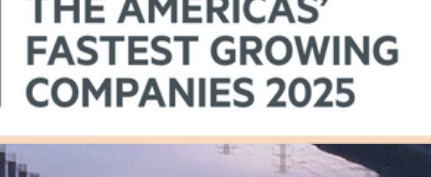#agentforce@hvt

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FT FINANCIAL TIMES statista THE AMERICAS' FASTEST GROWING COMPANIES 2025

14+ Years of successful business operations	400+ Team of seasoned professionals	7 Locations across the globe	4.5 + CSAT Score	150+ Salesforce Certifications

HVT POC

1

Einstein Prediction Buildervt
Functionality: Creates custom AI predictions for Salesforce objects like churn, lead conversion, or payment defaults using historical data, no coding required.
Generic Use Cases: Assists sales teams by identifying leads most likely to convert, allowing reps to prioritize high-value opportunities and improve win rates.

2

Einstein Opportunity Scoring
Functionality: Score opportunities dynamically based on sales data to predict closure likelihood, ensuring accurate, timely insights into your sales pipeline.
Generic Use Cases: Helps sales teams focus on deals with the highest potential, enabling efficient resource allocation to maximize conversion rates and revenue growth.

3

Einstein Lead Scoring
Functionality: Rank leads by conversion probability using historical data, helping sales teams prioritize high-potential prospects efficiently and effectively.
Generic Use Cases: Prioritizes high-scoring leads for sales reps, ensuring they focus on leads most likely to convert and reducing time spent on low-potential leads.

4

Einstein Case Classification
Functionality: Automatically tag support cases using AI-driven suggestions from historical data, enabling agents to categorize and act faster on cases.
Generic Use Cases: Speeds up case resolution by routing cases to the correct teams or agents based on classification, helping streamline the support process and improve response times.

5

Einstein Discovery
Functionality: Simplifies analytics with Einstein Discovery, delivering predictive insights to understand key outcomes like sales performance or customer churn. **Generic Use Cases:** Guides decision-making by revealing factors that drive conversions or influence retention, helping teams fine-tune strategies for improved results.

6

Einstein Recommendations
Functionality: Provides personalized recommendations by analyzing behavior patterns, enhancing engagement with tailored content or product suggestions.
Generic Use Cases: Boosts e-commerce engagement by recommending products that match customers' past behaviors, increasing chances of cross-sell and upsell, and driving higher purchase rates.

7

Einstein Bots
Functionality: Deploys AI-driven chatbots to automate responses for common inquiries, improving efficiency and offering 24/7 customer support.
Generic Use Cases: Handles frequently asked questions, reducing inbound requests for support agents and ensuring customers receive immediate responses, even outside of business hours.

8

Einstein Next Best Action
Functionality: Offers real-time, context-based action recommendations during interactions, personalizing customer experiences with actionable Salesforce-driven insights.
Generic Use Cases: Suggests relevant offers or troubleshooting steps during customer interactions, enhancing engagement and customer satisfaction by providing personalized support.

9

Einstein Search Personalization
Functionality: Customizes search results based on user profiles and past behaviors, delivering highly relevant and personalized search experiences.
Generic Use Cases: Enhances search experiences by prioritizing relevant content for users, helping them quickly locate information, and improving productivity within Salesforce environments.

10

Agent Builder (AgentForce)
Functionality: Build guided workflows without coding, enabling agents to handle complex scenarios with structured paths tailored to business needs.

Generic Use Cases: Supports agents in handling complex processes by guiding them through each step, from troubleshooting technical issues to processing customer orders, improving response consistency and accuracy.

11

Model Builder (AgentForce)
Functionality: Empower users to create machine learning models for predictions or segmentation without coding, making AI accessible to all teams.

Generic Use Cases: Allows marketing teams to build models that predict customer behavior or sales potential, helping tailor campaigns and focus on high-impact actions for better results.

12
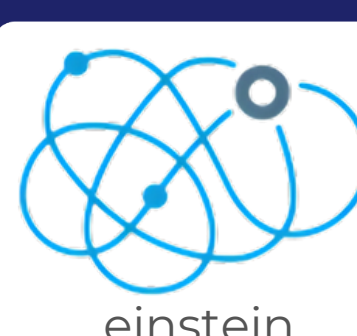
Prompt Builder (AgentForce)
Functionality: Use Prompt Builder to manage LLM prompts, integrating generative AI into workflows for tailored Salesforce-driven text outputs without coding.

Generic Use Cases: Use a Sales Email prompt template to draft personalized emails for leads or contacts, or to generate summaries of records or customers.

TECH STACK

- salesforce
- salesforce sales cloud
- einstein
- tableau
- community cloud
- MuleSoft
- salesforce financial cloud
- salesforce service cloud
- salesforce marketing cloud
- Vlocity
- salesforce pardot

WHY HEXAVIEW

Hexaview's Salesforce expertise covers Agentforce (Einstein AI), Marketing Cloud, VLOCITY, Sales Cloud, PARDOT, Tableau, Experience Cloud, MULESOFT, Salesforce Mobile, Services Cloud, and Financial Cloud. We innovate to meet every client's need, streamlining operations, boosting sales, optimizing marketing campaigns, and enhancing customer service. Our Salesforce solutions bridge the gap between clients and customers, ensuring seamless engagement and business success.

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