

TECHNOLOGY SERVICES

SALESFORCE AI: DRIVING SMARTER BUSINESS DECISIONS

Salesforce AI empowers organizations to leverage predictive, generative, and agentic AI features to streamline operations, enhance customer experiences, and achieve business goals.

PREDICTIVE AI FEATURES

Lead/Opportunity Scoring: Analyzes historical data to prioritize leads, predicting which are most likely to convert or close.

Case Classification: Automatically categorizes cases based on historical data, expediting case assignment.

Einstein Prediction Builder: Enables the creation of custom AI models to predict outcomes like churn likelihood or payment defaults, all without writing a single line of code.

Forecasting: Offers data-driven sales forecasts to help teams plan and allocate resources effectively.

Next Best Action: Provides tailored recommendations for the most effective customer interactions, such as cross-sell opportunities, product offers, or knowledge articles.

Einstein Discovery/Einstein Analytics: Delivers actionable insights and prescriptive recommendations by analyzing business data, identifying contributing factors, and enabling what-if simulations.

GENERATIVE AI FEATURES

Data Cloud is required for most generative features.

Custom Bots/Copilots: AI-powered conversational tools to assist customers or internal users. Bots manage simple tasks, while Copilots leverage generative AI for robust reasoning and context-aware interactions.

Einstein for Sales:

- **Sales Email:** Creates personalized email drafts for efficient communication.
- **Sales Summaries:** Automatically generates concise overviews of Salesforce records.
- **Call Summaries/Call Explorer:** Extracts insights and generates questions from recorded meetings.
- **Close Plans:** Suggests action plans for closing specific opportunities.

Einstein for Service:

- **Knowledge Creation:** Drafts articles based on customer interactions.
- **Knowledge Recommendations:** Recommends articles to expedite issue resolution.
- **Case Summary/Wrap Up:** Automates case closure summaries and fields based on related activities.
- **Service Replies:** Provides agents with recommended responses or article suggestions during customer interactions.

Marketing Cloud:

- **Engagement Scoring/Frequency Insights/Copy Insights:** Predicts content engagement to refine marketing strategies.
- **Email Content Creation:** Generates topics and copy for impactful marketing emails.

AGENTIC AI FEATURES

Agentforce/Agent Builder: Powered by a sophisticated reasoning engine, Agentforce supports the creation of agents that execute pre-built processes.

- **Conversation-Based Pricing:** Starting at \$2 per conversation, with volume discounts available. Includes base Data Cloud SKU with integrated reasoning engine and Trust Layer.
- **Extended Data Sources:** Enhance functionality by integrating multiple data sources, which may require additional investment in Data Cloud.

AI-DRIVEN SUCCESS ACROSS TEAMS

With the ability to harness historical data, real-time insights, and sophisticated reasoning engines, Salesforce AI transforms how teams across sales, service, and marketing operate. Explore feature offerings and discover how they can work for you.

FY24 pricing and additional information is provided [here](#).

TRANSFORM YOUR BUSINESS WITH SALESFORCE AI

Salesforce AI is designed to meet the evolving needs of modern organizations, offering scalable solutions that adapt to your business processes. From predictive insights to generative capabilities and powerful agentic tools, Salesforce's AI features drive efficiency, engagement, and growth. Contact Sikich today to discover how Salesforce AI can empower your team to achieve more.

For more information about our services, visit www.sikich.com.

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