

# Salesforce Capabilities & Einstein AI



# Our Salesforce Ecosystem Capabilities



## Service Offerings



Consulting &  
Roadmaps



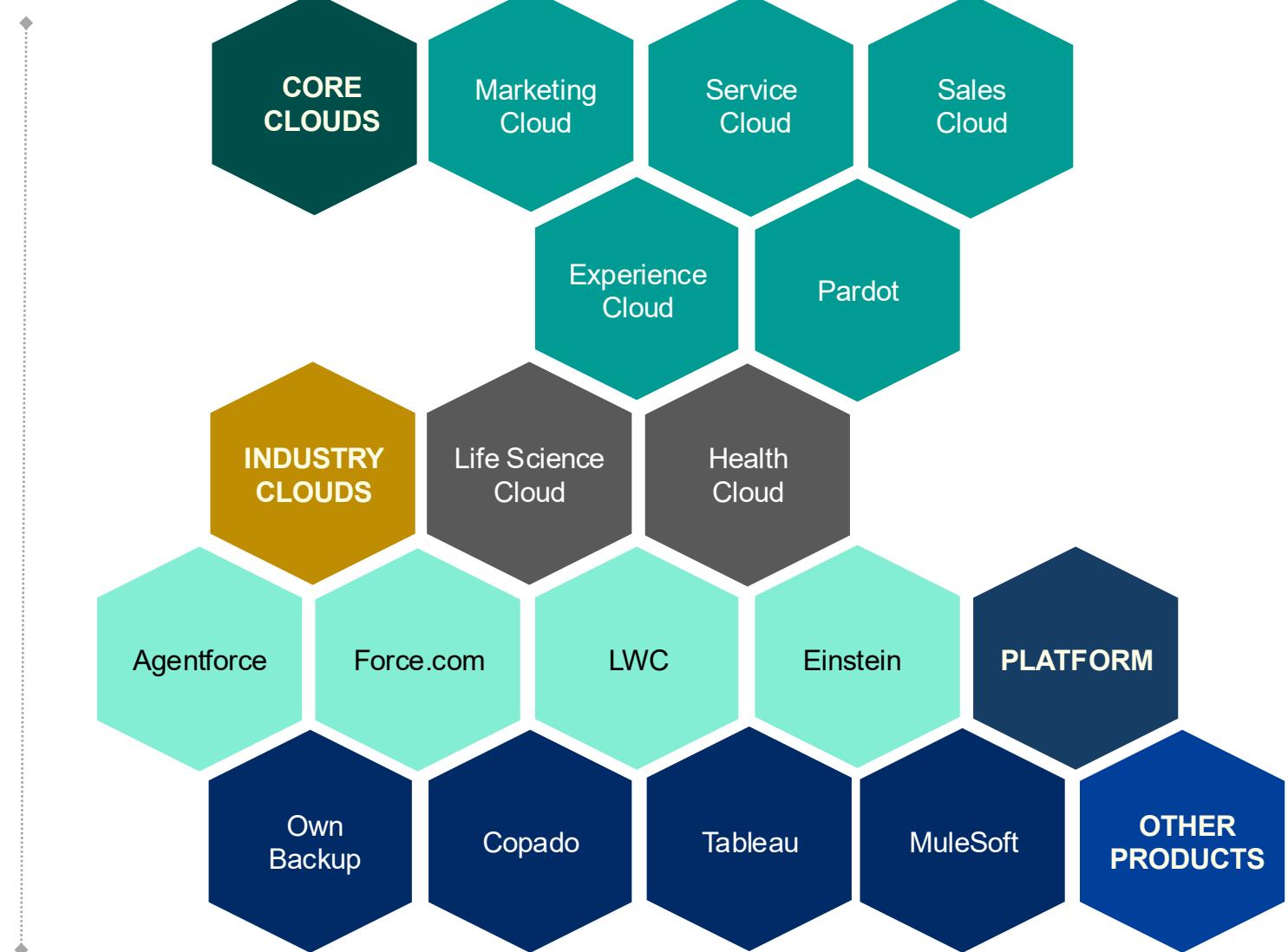
Architecture &  
Design



Implementation



Mgd. Services &  
Quality Engg.



# Sample Business Solutions delivered leveraging Salesforce

<b>Sales Cloud</b> Field Plan, Call optimization, IC workflows  <b>OUR EXPERIENCE</b> <ul style="list-style-type: none"><li>• Territory Planning</li><li>• Lead &amp; Call plan automation</li><li>• Hybrid IC model setup</li><li>• Rebate &amp; Commission workflows</li></ul>	<b>Service Cloud</b> Omnichannel support, CTI, agent routing  <b>OUR EXPERIENCE</b> <ul style="list-style-type: none"><li>• Clinical Trial Matching</li><li>• CTI &amp; Live Agent integration</li><li>• Chatbot &amp; escalation rules</li></ul>	<b>Marketing Cloud</b> HCP/patient journey orchestration, campaign ROI  <b>OUR EXPERIENCE</b> <ul style="list-style-type: none"><li>• Journey Builder setup</li><li>• Patient Outreach for Trials</li><li>• Campaign personalization</li><li>• Consent-aware marketing</li></ul>	<b>Health Cloud</b> (rolled under LS Cloud) Patient 360, PSP/PAP workflows, care coordination  <b>OUR EXPERIENCE</b> <ul style="list-style-type: none"><li>• Case &amp; Care plan setup</li><li>• Patient Reported Outcomes (PRO)</li><li>• Patient onboarding flows</li><li>• Follow-up scheduling</li></ul>
<b>Experience Cloud</b> HCP/patient portals, digital self-service  <b>OUR EXPERIENCE</b> <ul style="list-style-type: none"><li>• Portal design (HCP, PSP)</li><li>• Patient Access, CoPay Platforms</li><li>• Donations Portals</li><li>• Patient Cohorts, Community Collab</li><li>• Branded interface development</li></ul>	<b>Data Cloud</b> Unified 360° view of HCPs and Patients  <b>OUR EXPERIENCE</b> <ul style="list-style-type: none"><li>• Harmonization, segmentation refresh, metadata governance</li></ul>	<b>Lightning Web Components</b> Custom UI, branded apps, performance UX  <b>OUR EXPERIENCE</b> <ul style="list-style-type: none"><li>• Custom portal components</li><li>• App extensions for reps</li><li>• Theming &amp; responsive design</li><li>• Patient Portals, HCP Portals</li></ul>	<b>Einstein AI / Agentforce</b> Predictive routing, proactive case/patient alerts  <b>OUR EXPERIENCE</b> <ul style="list-style-type: none"><li>• Smart case assignment</li><li>• Patient Adherence / behavior nudges</li><li>• Resolution scoring logic</li></ul>

## Salesforce solutions implemented across the LS value chain

Discovery



Development



Manufacturing & Supply Chain



Commercial



Salesforce Usage

# Salesforce Life Sciences Cloud

Areas we are preparing to support our clients with upcoming Salesforce LS Cloud capabilities to be launched in the coming months

## Account Management

- Unified HCP/HCO profiles with affiliations
- Map referral flows and treatment networks
- Segment prescribers by specialty or influence
- Track KOLs across therapeutic franchises

## Territory Management

- Align territories to HCP prescribing trends
- Auto-adjust coverage by patient volume shifts
- Integrate KOL clustering for rep focus
- Map reps to compliant HCP touchpoints

## Product Management

- Manage PI-based HCP eligibility
- Govern NDCs across lifecycle stages
- Link assets to rep detailing workflows
- Align products to therapeutic area plans

## Call Reporting & Pre-Call Planning

- Plan HCP calls using treatment insights
- Capture samples with digital consent traceability
- Record MSL scientific exchanges compliantly
- Suggest next-best action by specialty

## Strategic Field Planning

- **Strategic Account Planning** – Tailored strategies for key HCP/HCOs
- **Objectives & Tactics** – Align brand goals to rep execution
- **To-dos & Tracking** – Monitor field activity against brand KPIs

## Omnichannel Engagement & Compliance

- **CLM/e-Detailing** – Deliver approved assets through digital channels
- **Compliant Email** – Send regulatory-safe communications to HCPs
- **Preferences/Consent** – Respect HCP opt-ins across all touchpoints

## Campaign Execution & Governance

- **Cycle Plans** – Coordinate omnichannel rep activities by cycle
- **Segmentation/Targeting** – Group HCPs by specialty, volume, influence
- **Offline Dashboards** – Equip reps with insights in low-connectivity zones

## Commercial Insights & Field Optimization

- **Sampling** – Enable digital sampling with eligibility checks
- **Call Insights** – Analyze patterns in HCP engagement logs
- **Territory Adjustments** – Model rep alignments for dynamic field needs

# A sample of our Pharma engagements leveraging Salesforce

## 1. HCP360 – Field-Rep HCP Experience



### **Business Context**

Reps lacked clarity on HCP priority tiers and spent excessive time on data correction, limiting high-impact scientific engagement

### **Solution**

Agilisium enabled a Salesforce-Veeva integrated HCP360 with automated DCRs, real-time data sync, and key HCP identification

### **Commercial Outcome**

Boosted rep efficiency, improved KOL targeting, and enhanced field effectiveness through clean, actionable HCP insights.

## 4. Intelligent Case Management for Enhanced HCP and Patient Support



### **Business Context**

Delayed responses and fragmented service workflows were impacting HCP satisfaction and patient support quality.

### **Solution**

Agilisium deployed Salesforce Service Cloud with omni-channel routing and automation to streamline case triage and service resolution.

### **Commercial Outcome**

Improved first-contact resolution, boosted agent productivity, and enhanced overall support experience across channels.

## 2. Provider Rebate Program Manager



### **Business Context**

Manual rebate workflows led to processing delays, high error rates, and compliance exposure — impacting provider trust and operational efficiency

### **Solution**

Agilisium built an end-to-end Rebate Program Manager using Salesforce Sites, APEX, Flows, and Visualforce to automate enrollment, validation, and payment cycles.

### **Commercial Outcome**

Achieved 60% faster rebate processing and reduced 90% of manual errors, enabling scalable, compliant rebate operations

## 3. Integrated Patient Journey & Experience Enhancement



**Business Context:** Siloed CRM systems and fragmented touchpoints delayed therapy initiation and limited visibility into patient support activities.

**Solution:** Agilisium deployed a unified patient data repository using Salesforce Sales Cloud, Service Cloud, and Einstein Analytics to centralize journey insights and enable real-time case management

**Commercial Outcome :** Reduced patient time-to-therapy by 18 days and empowered 2,500+ care agents with real-time visibility—elevating patient experience and care team productivity

## 4. Intelligent Case Management for Enhanced HCP and Patient Support



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## 5. Centralized HCP Preference Management for Compliant Engagement



### **Business Context**

Inconsistent opt-in/out data across teams led to compliance risks and disjointed HCP communication.

### **Solution**

Built a unified Preference Center on Marketing Cloud to manage global consent, sync preferences in real-time, and ensure message compliance.

### **Commercial Outcome**

Enabled compliant, consistent HCP engagement and improved efficiency in omnichannel campaign execution.

## 6. Commercial Data Assurance for Regulatory Readiness



### **Business Context**

Lack of structured data retention created risks for compliance audits and commercial continuity.

### **Solution**

Implemented OwnBackup to protect HCP and engagement data, enforce retention policies, and support GxP-aligned recoverability.

### **Commercial Outcome**

Ensured audit readiness, protected campaign continuity, and strengthened compliance posture across commercial operations.

# Einstein AI Capabilities

Transforming Digital Experiences with Scalable, Personalized, and AI-Driven Experience Cloud Solutions for Seamless Customer, Partner, and Patient Engagement

## Our Service offerings

### AI-Powered Sales Intelligence & Call Analytics

- Implement AI-driven conversation analytics to analyze HCP sales calls, extract insights, and enhance engagement strategies.
- Automate compliance tracking and integrate real-time call insights into CRM and sales workflows for seamless operations

### Predictive Lead & Opportunity Scoring Implementation

- Configure AI-powered lead scoring models to rank HCPs and accounts based on engagement potential.
- Automate opportunity prioritization and integrate predictive insights into Veeva CRM, Sales Cloud, and Service Cloud

### AI-Enabled Next Best Action Customization

- Develop AI-driven recommendations based on engagement patterns, prescribing behavior, and sales data.
- Automate next-best actions for pharma reps while ensuring regulatory and compliance alignment.

### AI-Powered Virtual Sales Agents

- Automate HCP queries, appointment scheduling, and engagement with AI-driven assistants
- Optimize sales workflows using intelligent conversation automation for seamless interactions

### Virtual Sales Agents & AI-Driven Conversational Assistants

- Deploy AI-powered virtual assistants for HCP engagement, medical query handling, and appointment scheduling.
- Integrate conversational AI into Veeva CRM and sales ecosystems to streamline workflows

### AI-Powered Content & Email Personalization

- Utilize Einstein GPT to generate personalized emails, sales pitches, and marketing content
- Automate content creation for HCP engagement based on past interactions and preferences

### Agent force AI for Smart Case Resolution & Self-Service (this addresses service cloud related AI features)

- Configure AI-driven case management with automated routing, classification, and resolution recommendations to improve service efficiency.
- Integrate AI-powered knowledge search to enhance self-service support, enabling faster issue resolution and a better customer experience

## Top Sales Cloud challenges Industry wide

Inefficient Medical Query Handling

Data Overload & Decision-Making Bottleneck

Manual & Reactive Sales Forecasting

Disconnected CRM & Sales Ecosystem

Inefficient Workflow & Manual Processes

Compliance & Regulatory Tracking

Omnichannel Communication Complexity

HCP Engagement & Sales Optimization

# Einstein AI Case Studies – Deep Dive



# Einstein AI POC – Sales Cloud

Salesforce AI tools like Einstein Copilot, Generative AI, and Next Best Action boost sales productivity by optimizing leads, insights, and workflows for data-driven growth



## Business Case

- Manual lead and opportunity prioritization
- Limited search and recommendation capabilities
- Labor-intensive data entry for meeting and call summaries
- Subjective follow-up planning
- Template-based or manual customer communication



## Solutions Highlights

- **AI-Driven Automation:** Automated lead scoring and opportunity prioritization
- **Real-Time Insights:** AI-powered recommendations for personalized engagement
- **Automated Workflows:** Streamlining follow-ups, email drafting, and customer interactions
- **Enhanced Decision-Making:** AI-generated insights for improved forecasting and strategy development



## Benefits



Higher efficiency in closing deals and identifying high-value opportunities



More targeted and personalized customer interactions



## Business Outcome

- **Higher Sales Productivity:** Reduction in manual tasks through automation
- **Optimized Lead & Opportunity Management:** AI-powered scoring and prioritization
- **Personalized Customer Engagement:** AI-driven email drafting and automated follow-ups
- **Proactive Sales Strategies:** Predictive insights supporting cross-selling, upselling, and deal management



## Technical Approach

- Einstein Enabling Einstein Copilot: Assign Einstein user permissions → Setup → Einstein Setup → Enable → Agents → Einstein Copilot → Agent Builder → Validate → Activate.
- Lead and Opportunity Scoring: (Global model: No data requirements) (Local model:  $\geq 1,000$  leads,  $\geq 200$  closed-won &  $\geq 200$  closed-lost opportunities in 2 years) Setup → Sales → Activate Lead & Opportunity Scoring → Configure Scoring Criteria → Review predictions.
- Einstein Conversation Insights: (Requires CTI call/video recordings) Assign Einstein user permissions → Setup → Sales → Activate Conversation Insights → Configure Recording & Transcription → Integrate CRM Data → Review call summaries.
- Einstein Sales Email: (No data requirements) Assign Einstein Sales Email permissions → Setup → Einstein Setup → Enable → Einstein for Sales → Activate Sales Email → Configure Templates & Automation → Integrate CRM → Test responses.
- Einstein Recommendation Builder & Next Best Action: (No data requirements) Assign Einstein user permissions → Setup → Einstein Setup → Enable → Recommendation Data → Flow → Activate Next Best Action → Configure Builder → Integrate Lead/Opportunity Data → Deploy



Faster deal closures with AI-driven decision-making

Proactive engagement through automated insights

# Einstein AI POC – Service Cloud

Salesforce AI tools like Einstein Generative AI, Reply Recommendations, and Case Classification enhance customer service by automating tasks, providing context-aware recommendations, and improving efficiency



## Business Case

- **Manual Case Classification** – Agents manually classify cases, leading to inconsistencies and delays
- **Inefficient Knowledge Access** – Knowledge articles are searched without AI-powered recommendations
- **Subjective Decision-Making** – Next actions rely on agent experience rather than data-driven recommendations
- **Manual Logging & Workload Distribution** – Summaries and workload assignments are done manually, impacting efficiency



## Solutions Highlights

- Automate Case Classification – AI-driven case triaging for faster resolution
- Enhance Knowledge Management – AI-powered recommendations for relevant knowledge articles
- Optimize Agent Workflows – AI-generated case wrap-ups and response suggestions
- Streamline Customer Interactions – Proactive, personalized recommendations for improved engagement



## Benefits



Reduced average case handling time



Faster response times and resolution rates



## Business Outcome

- Faster Case Resolution – AI-powered automation reduced manual classification and response times
- Improved Agent Productivity – Automated case summaries and recommendations enabled agents to focus on high-value tasks
- Enhanced Customer Satisfaction – Proactive insights and AI-driven responses ensured consistent, timely support
- Optimized Workflows – AI-driven workload distribution reduced bottlenecks and inefficiencies



## Technical Approach

- (Data Not Required to build) Enabling Einstein Reply Recommendation : Setup -> Einstein Reply Recommendation -> Enable and build recommendation model, publish the replies, give agent access -> Activate
- (Knowledge Article Required) Enabling Einstein Article Recommendation: Setup -> Einstein Article Recommendation -> Enable -> Select the fields from Case and knowledge object-> activate the model
- (400+ Closed cases required) Enable Einstein Case Classification : Setup -> Einstein Case Classification -> Enable -> Build the model by choosing fields from case -> Activate
- (Data not required to build) Enable Einstein Next Best Action :Setup → Enable Next Best Action → Flow Builder → New Flow → Recommendation Strategy to design logic, retrieve recommendations, and assign them to the output collection for display on Lightning or Experience Cloud pages
- (Data not required to build) Enabling Prompt Builder for Case Summary: Setup -> Einstein Setup -> Enable einstein setup / Setup-> Einstein for Sales ->Enable Sales Emails
- Enabling Einstein Service Reply: Service Setup -> Knowledge setting -> Configure Knowledge setup / Setup → Service Replies for Email and assign the Email Response User permission set in Setup → Permission Sets. (Data not required)



AI-driven knowledge access improved accuracy in issue resolution



Automation reduced manual workloads, allowing agents to focus on high-value tasks, leading to more consistent and personalized support interactions

# Einstein POC AI – Field Service Cloud

Salesforce AI solutions enhance field service efficiency through predictive insights, automation, and AI-driven recommendations for optimized resource allocation and customer experience



## Business Case

- Manual Work Order Assignments** – Dispatchers assign tasks based on discretion rather than data-driven insights.
- Lack of Predictive Maintenance** – Repairs are reactive or scheduled based on fixed intervals, leading to unexpected failures and increased downtime.
- Basic Technician Performance Analysis** – Job forecasting relies on static data, affecting service efficiency.
- Inventory & Customer Support Inefficiencies** – Manual tracking of parts and tools leads to delays and suboptimal resource utilization



## Solutions Highlights

- Predict Equipment Failures** – AI-powered predictive maintenance to reduce downtime and costly repairs
- Optimize Technician Assignments** – AI-driven technician selection based on skills, proximity, and urgency
- Improve Resource Allocation** – Predict part and tool availability to prevent delays
- Enhance Service Delivery** – AI automation for smarter scheduling and real-time insights



## Benefits



Faster job assignments, optimized resource planning, and reduced downtime



AI-driven technician selection improved issue resolution and service accuracy



Reduced manual intervention and minimized unplanned maintenance expenses



Faster response times and more accurate service delivery



## Business Outcome

- Proactive Maintenance** – Predictive insights enabled preventive repairs, reducing equipment downtime.
- Smarter Technician Assignments** – AI matched technicians to jobs based on availability, expertise, and location.
- Optimized Resource Availability** – AI anticipated part and tool needs, minimizing delays.
- Faster & More Accurate Service Delivery** – Automated workflows improved first-time fix rates and response times



## Technical Approach

- CRM Analytics License required, Data inputs required(Viz Equipment status, maintenance history, performance data) → Processed by **Einstein Discovery** → Predictive maintenance insights, anticipate equipment failures / Predicts part and tool requirements for each job / Forecasts demand and suggests optimal staffing levels → Displayed in Salesforce Field Service for scheduling and action
- Data inputs required(Viz Technician skills, location, service request details) → Processed by **Einstein for Field Service** → Optimized technician dispatch based on skills, proximity, and urgency → Displayed in real-time for dispatchers and technicians
- Data inputs required(Viz Job details, technician actions) → Processed by **Einstein Generative AI** → Automatically generates detailed service reports (Use Record-Triggered Flow's Action Element to call Einstein Generative AI to process data and provide report) → Displayed in Salesforce Field Service for documentation and review
- Data inputs (Viz Customer service history, common troubleshooting queries, technician availability) → Processed by **Einstein Bots** → Provides automated troubleshooting, scheduling, and technician updates → Displayed on customer-facing platforms for self-service



# Thank You