

Salesforce Capabilities & Einstein AI



Our Salesforce Ecosystem Capabilities

Service Offerings



Consulting & Roadmaps



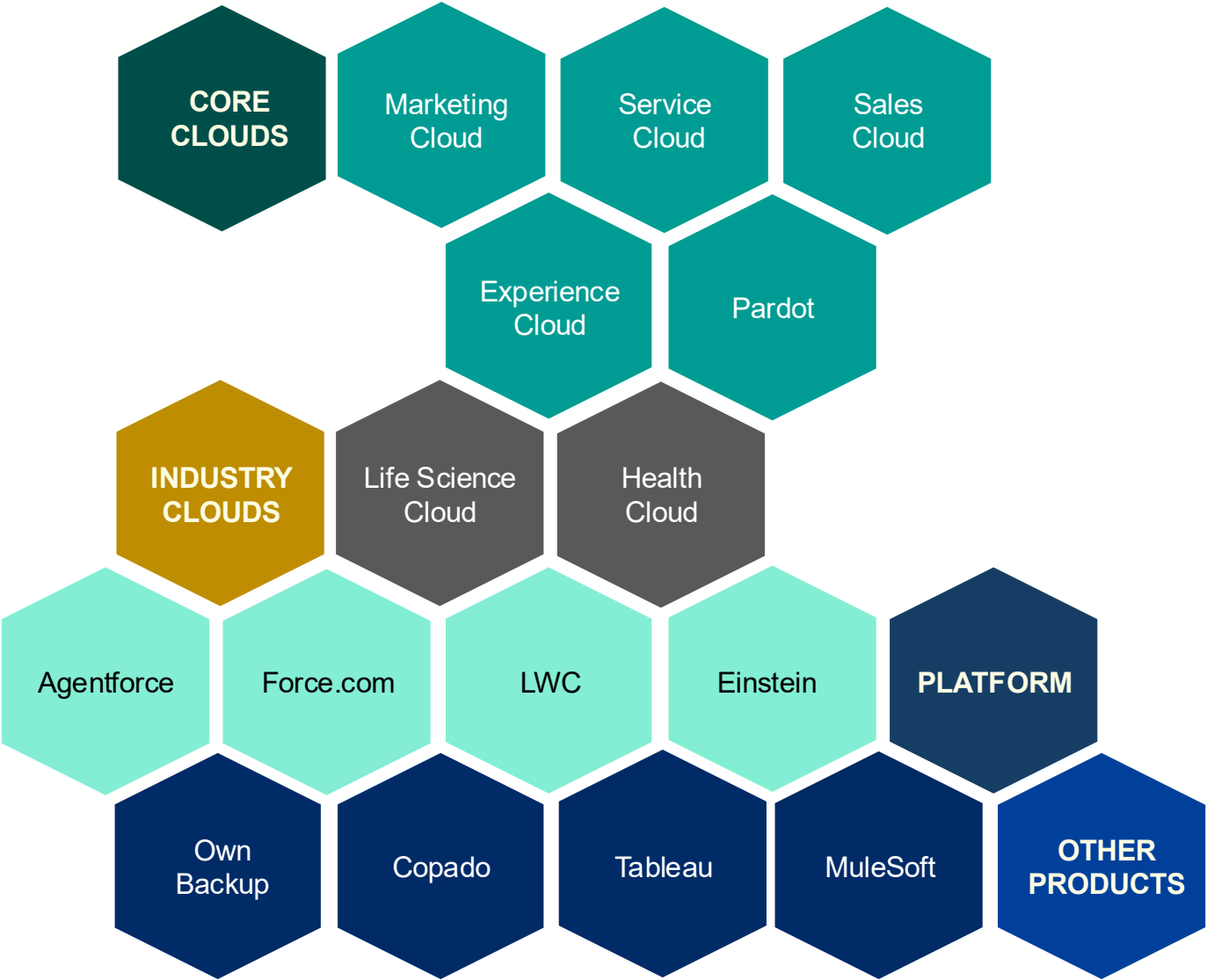
Architecture & Design



Implementation



Mgd. Services & Quality Engg.



Sample Business Solutions delivered leveraging Salesforce

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

Salesforce solutions implemented across the LS value chain

Discovery 	Development 	Manufacturing & Supply Chain 	Commercial 
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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.

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



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.

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



Own{backup}

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



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: ≥1,000 leads, ≥200 closed-won & ≥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



Benefits



Higher efficiency in closing deals and identifying high-value opportunities



More targeted and personalized customer interactions



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



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)



Benefits



Reduced average case handling time



Faster response times and resolution rates



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



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



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

The background features a blue-toned image of two hands shaking, symbolizing agreement or partnership. Overlaid on this is a network of thin white lines connecting various dots in shades of blue, green, and black. A large, white, stylized double-lined arrow points to the left, framing the text.

Thank You