Sales Cloud Einstein

The world's #1 CRM is now the world's most intelligent CRM with Einstein AI

We may not even recognize it, but artificial intelligence (AI) is making our personal lives better. Apple uses natural language processing to understand the context of spoken words. Facebook taps into machine learning for facial recognition, making photos more social. Google uses deep learning to help cars learn to drive autonomously.

We're only at the beginning, but it's already clear how artificial intelligence simplifies vast amounts of information to help us do what we want to do better. So, why isn't artificial intelligence being used in the apps we rely on for work?

Introducing Sales Cloud Einstein

Salesforce Einstein is artificial intelligence (AI) built into the core of the Salesforce Platform where it powers the world's smartest CRM. When combined with Sales Cloud, Einstein helps reps win more deals with intelligent automation, smarter scoring, actionable insights, and predictive forecasting.

Key Capabilities

- **Einstein Lead and Opportunity Scoring** – Prioritize deals and win more

- **Einstein Opportunity and Account Insights** – Secure opportunities and reduce forecast risk

- **Einstein Forecasting** – Increase forecast accuracy and gain insight into forecast drivers

- **Einstein Activity Capture and Automated Contacts** – Automate data entry and spend more time selling

- **Salesforce Inbox** – Bring email, calendar, and Salesforce together to never miss a buying signal

- **Sales Analytics** – Make better decisions and close more deals

Drives Sales Performance

20%
INCREASE IN PRODUCTIVITY
ZEN

30%
INCREASE IN WIN RATES
SILVERLINE

10x
MORE DATA FROM SALES REPS
WORLDWIDE EQUIPMENT WE THE TRUCK PEOPLE

Are You an Existing Sales Cloud Customer?

Determine if your Salesforce org is ready for each feature with the Sales Cloud Einstein Readiness Assessor. Within minutes of running the Assessor, you will receive a readiness report that shows which features you're ready to use today and any steps needed to enable others. You can access the Assessor through setup, or here:
http://einsteinreadiness.salesforce.com

Einstein Lead Scoring
Convert more leads, faster

 salesforce sales cloud

Are your reps working on the right leads? You've seen it thousands of times: Your sales reps sift through a sea of leads prioritizing and filtering based on simplistic criteria like "this one is in my region," or "that one is in our target industry," or even "that company is big." With Einstein Lead Scoring, there is a better way.

Einstein Lead Scoring helps sales reps convert more leads, faster. It uses artificial intelligence to automatically analyze your historical sales data and discover the top factors that determine whether a lead is likely to convert to an opportunity. Sales reps can segment and prioritize leads based on a numerical 1–99 score, and gain insight into the factors that explain why leads are likely to convert or not. The factors are displayed on each lead record, helping sales reps prepare for every call quickly. It's like giving each rep a personal data scientist to take conversion rates to the next level.
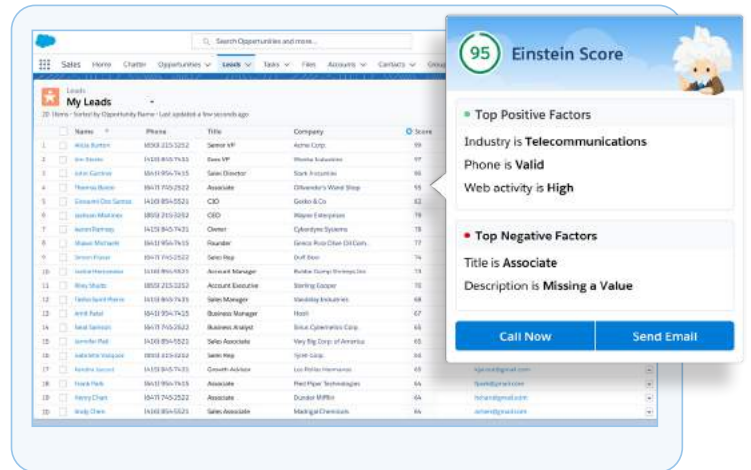
> "Einstein surfaces the best leads to our loan officers, which has a direct impact on our conversions."
>
> RateWise Mortgage

Lead Score in a List

Einstein Lead Scoring analyzes all standard and custom fields attached to the Lead object, and allows Admins to exclude fields that are not predictive. Then, Einstein analyzes different predictive models like Logistic Regression, Random Forests, and Naive Bayes and selects the best one based on a sample dataset. There is no need for a Ph.D. in statistical analysis or mathematics because Sales Cloud Einstein has done the heavy lifting by finding the best model to drive lead conversion.

Models are updated monthly on the most recent six months of lead conversion data to make sure you have the most accurate predictions for your leads. Leads are scored every hour using the latest model. If something changes on one of your leads, it will be rescored within the next hour.

Data Science That Works Automatically

The magic behind Einstein Lead Scoring is the machine learning that continually improves the accuracy of Einstein's predictions. For example, Einstein might automatically discover, based on your latest data in Salesforce, that VPs in a certain industry who view demos are great leads. In fact, it not only discovers the insight, but it predicts just how likely the lead will be to convert with a smart lead score. Einstein even provides direct insight into how the score was determined automatically via the lead scoring factors. Scoring factors are ranked by influence level and can be made visible in Lead detail pages, in hover over on list views and in the Lead Performance Dashboard.

How Einstein Lead Scoring Works

Unique Einstein Lead Scoring predictive models are built for each Salesforce customer, which ensures that the scores and scoring factors are tailored to their business. How?

Top Benefits

- **Increase Conversion Rates**
- **Prioritize Focus on The Best Leads**
- **Understand Lead Score Factors**

Top Features

- **Four-Click Setup** – Deliver scores and insights quickly
- **Prioritize Lead Lists** – Surface the best leads
- **Smart Workflow** – Easily assign tasks based on predictions
- **Availability** – Both Lightning and Classic
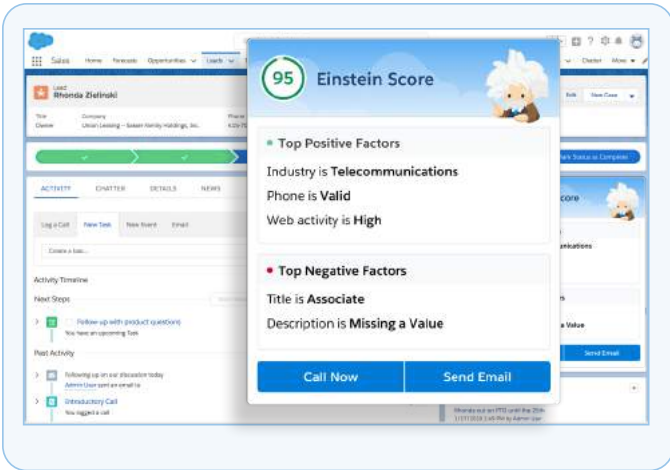
Einstein Lead Scoring in Lightning Experience
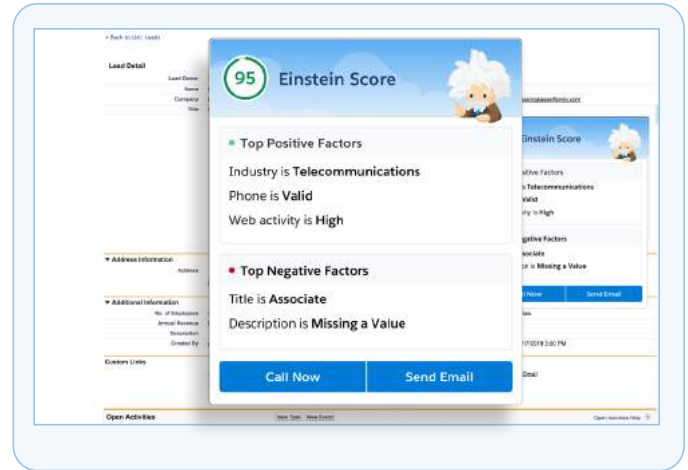
Einstein Lead Scoring in Classic

Technical Specifications	
Data Sources	
Standard fields	In Lead object only
Custom fields	In Lead object only
Third-party data (e.g., Bombora, Eloqua scores, SAP data, etc.)	In Lead object only
Scoring Requirements	
Leads can be converted to either a contact and account or an opportunity, contact and account	✓
Lead conversions	At least 120 in the last 6 months
Model Development	
Automatic model development and adaptation	✓
Ability to exclude fields from model	✓
Marketing Automation Integration	
Consumption of marketing engagement data	Must be imported into Lead object custom field
Native Pardot integration	Must be imported into Lead object custom field*
Native third-party marketing automation vendor integration	Must be imported into Lead object custom field
User Experience	
Lightning Experience or Classic	✓
Prebuilt Lightning components	✓
Score inclusion in Lead lists	✓
Score-driven automation in Process Builder	✓
Prebuilt lead scoring performance dashboard and reports	✓

Einstein Opportunity Scoring
Focus on the right deals, every time

salesforce sales cloud

magine if one of your forecasted opportunities was about to fall out of the forecast, but you didn't know. It's probably not difficult to imagine – it's a common challenge that most salespeople struggle with. The good news: There is a better way.

What if you had a personal data scientist monitoring every one of your opportunities, continually scoring them so you could determine the health of each one? You'd prioritize your day to ensure that every opportunity was on a path to close. You'd take action on unhealthy opportunities proactively, and you'd carefully nurture them with the right next steps to win more.

In a nutshell, that's Einstein Opportunity Scoring.

Einstein Opportunity Scoring helps sales reps focus on the right deals, every time. It analyzes past opportunities to create a model that predicts which opportunities are most likely to be won. Each opportunity is given a score (a number from 1 to 99) that is available on opportunity records, in list views, in custom reports and can be added to collaborative forecasting. Einstein also shows the factors that have contributed the most to the score, both positively and negatively. For example, a score might be relatively high because the opportunity is moving quickly through the stages compared to other opportunities.

> "Our sales team is now able to prioritize actions based on the score of an opportunity."
>
> **Yohann Lecornet**
> CTO
> Zenconnect

Data Science That Works Automatically

Einstein Opportunity Scoring employs machine learning to continually learn which factors have the biggest influence over opportunities that close, and which are only minor players. For example, Einstein might automatically discover, based on your latest data in Salesforce, that opportunities that take more than 10 days to move between stages in your sales cycle are most likely to fall out of the forecast. In fact, it not only discovers the insight, but it predicts just how likely – or unlikely – the opportunity will be to convert with a smart opportunity score. Einstein even provides the factors into how the score was determined, automatically.

How Einstein Opportunity Scoring Works

Einstein Opportunity Scoring models are built specifically for each customer and organization, which ensures that the models are tailored to the business.

Opportunity scores are based on the record details, historical changes, and related activities of the opportunity and related account. Information about the opportunity's owner, such as yearly win rates, is also used to calculate the score. For each opportunity score, Einstein shows the factors that have contributed the most to the score, both positively and negatively. There is no need for a Ph.D. in statistical analysis or mathematics because Sales Cloud Einstein has done the heavy lifting by creating the best model to drive opportunity conversion.

Models are updated every 10 days to make sure you have the most accurate predictions for your leads. Opportunities are scored every four hours using the latest model so when opportunities change, each will be rescored quickly.

Top Benefits

- **Increase Win Rates**
- **Increase Forecast Accuracy**
- **Accelerate Sales Cycles**
- **Drive Sales Productivity**

Top Features

- **Key Factors** – Gives relevant and actionable insight
- **Smart Workflows** – Easily assign tasks based on scores
- **Prioritized Opportunity Lists** – Surface at-risk opportunities quickly
- **Availability** – Both Lightning and Classic
- **Three-Click Setup** – Deliver scores quickly
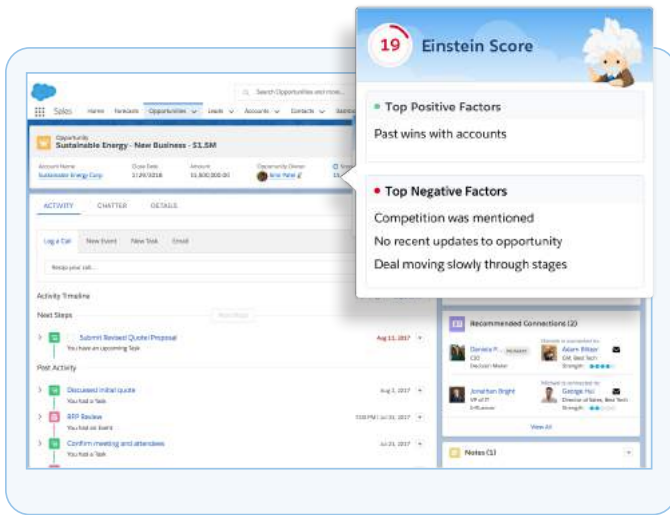
Einstein Opportunity Scoring in Lightning Experience
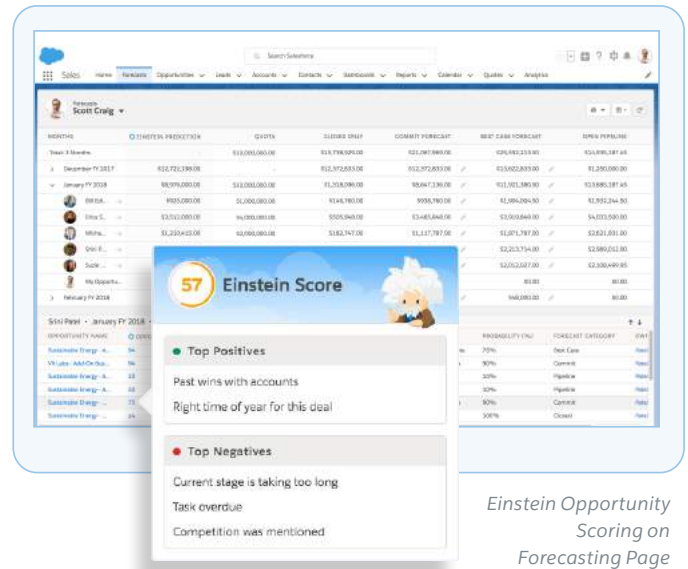
Einstein Opportunity Scoring on Forecasting Page

Technical Specifications	
Data Sources	
Standard fields	✓
Custom fields	✓
Model Development	
Automatic model development and adaptation	✓
User Experience	
Lightning Experience or Classic	✓
Prebuilt Lightning components	✓
Score inclusion in Opportunity lists	✓
Score-driven triggers in workflow	✓

Einstein Opportunity Insights and Einstein Account Insights
Secure opportunities and reduce forecast risk

There isn't a sales rep in the world who would willingly choose to miss an important piece of information, allow a customer request to go unanswered, or leave money on the table. But in today's world of information overload, it's difficult to keep pace with the tornado of information that swirls around sales teams every day. This is about to change.

Einstein Opportunity Insights and Einstein Account Insights, key capabilities of Sales Cloud Einstein, use artificial intelligence to help sales teams maximize every selling moment.

Einstein Opportunity Insights uses your Sales Cloud data from historical sales cycles and engagement with customers (for example, email) to discover unique patterns about your sales cycles. It recognizes when deals are on track or at risk, and offers recommendations on the best actions to take to accelerate sales and increase win rates.

Account Insights on Account Record Page

> "Silverline increased win rates by 30% with Einstein Opportunity Insights."
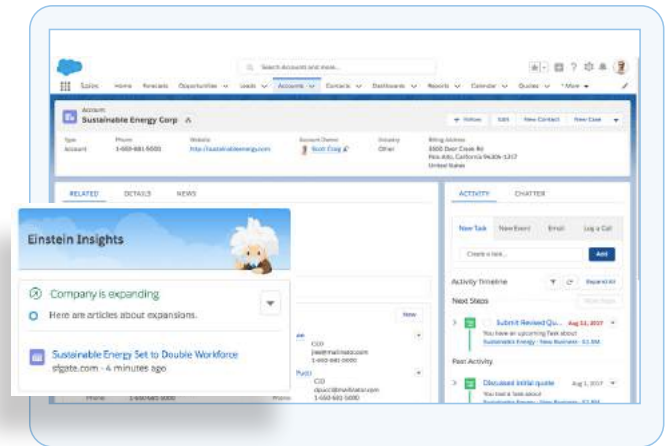
Kai Yu Hsiung
Chief Revenue Officer
Silverline

By analyzing thousands of news articles each day, Einstein Account Insights alerts sales users to critical developments affecting their accounts. Einstein Account Insights also provides focus around the most important issues facing every prospect, and ensures sales teams will increase their quality selling time.

events and changes in accounts that are important to users. Einstein Account Insights monitors U.S.-based news sources to surface merger-and-acquisition activity, leadership changes, and signs of company expansion.

Privacy

Businesses have the choice to connect their email to Salesforce using Einstein Activity Capture which helps capture data automatically. If choosing to connect to email, Einstein Insights will automate the capture of and analyze external communication only. Einstein Insights will not capture and analyze email within the company's domain email address, and email from specific addresses can be blacklisted from capture and analysis. Alternately, a business can choose not to connect their email to Salesforce and still enjoy the benefits of Einstein Insights based on other system data.
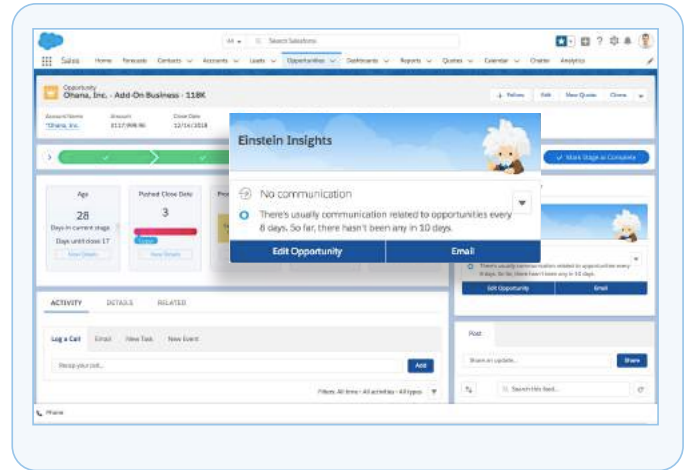
Einstein Opportunity Insights and Its Models

Each Einstein Opportunity Insights model is specific to the team using it and is built automatically to match that team's selling process. How? Sales Cloud Einstein analyzes all the standard fields attached to the Opportunity data in addition to email and calendar data, and then uses machine learning, natural language processing, and statistical analysis to provide sales reps and managers with Predictions, Key Moments, and Smart Follow-Ups. It's all automated. There's no need for a Ph.D. in data science – Sales Cloud Einstein does all the data science for you.

Einstein Account Insights and Its Sources

Einstein Account Insights are created by analyzing many thousands of news articles each day, identifying major

Top Benefits

- Increase Win Rates
- Improve Forecast Accuracy
- Accelerate Sales Cycles
- Drive Sales Productivity

Top Features

- **Three-Click Setup** – Deliver insights to reps quickly

- **Win Predictions, Key Moments, and Smart Reminders** – Identify Einstein Opportunity Insights and reasons why

- **Daily Digest** – Summarizes new Einstein Opportunity Insights and Einstein Account Insights each day

- **Recommended Next Steps** – Take action with one click

Einstein Opportunity Insights and Einstein Account Insights on the Lightning Experience Homepage

Einstein Opportunity Insights on the Lightning Experience Opportunity page

Technical Specifications	
Email Integration (Optional)	
Gmail, Microsoft Office 365, Microsoft Exchange 2013 or 2016, and hybrid deployments of Microsoft Exchange	✓
Model Development	
Automatic model development and adaptation	✓
Privacy Control	
Ability to ignore company domain emails	✓
Email address blacklisting	✓
Opportunity Insight Types	
Win Predictions	Winning unlikely*; high effort*; deal boosting* and deal slowing*
Smart Reminders	No communication*; prospect unresponsive*; past close date; no future activity; and overdue task
Key Moments	Competitor mentioned; contact leaving; and re-engaged opportunity
Account Insight Types	
Key Moments	Contact left and Competition mentioned*
Key Business Insights	Merger & Acquisition, Company Expanding, and Leadership Change*

* These insights require connecting Salesforce to your email with Einstein Activity Capture.

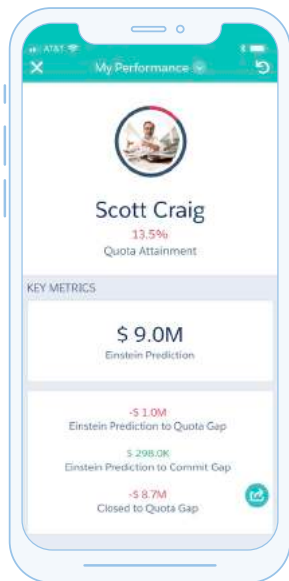# Einstein Forecasting
Drive business predictability

Today many sales organizations still rely heavily on outdated systems and incomplete spreadsheets to forecast sales projections. Using historical data and tribal knowledge about their close rates, they are able to look at their pipeline and see with some certainty if they are going to make or miss their number. This results in inaccurate forecasts, underperformance and missed quotas for sales teams. With Einstein Forecasting, you can deliver highly accurate sales forecasts on the world's #1 sales platform.

Einstein Forecasting is a fully automated, out-of-the-box solution that uses all of a company's historical CRM data to take the guesswork out of forecasting. Einstein Forecasting isn't just predictive. It's also proactive. When Einstein notices something irregular or at-risk, it notifies the manager that attention is needed. These insights are available both within the CRM and the mobile experience.

algorithm is used to create the most accurate model. Not only does each Sales Cloud customer get a personalized model, but each sales team within the customer's Sales Cloud org gets a personalized model. Models are rebuilt each month, and the forecast is recalculated through the model approximately every six hours.

Having accurate models isn't enough without relaying the prediction to sales leaders and reps in a intuitive, natural way. Einstein Forecasting provides the revenue prediction by month at the team level, and a confidence range. It also provides a waterfall breakdown so it's very easy to see what revenue has already closed, what new revenue is expected, and how much revenue is expected to fall out of the forecast. And it doesn't stop there - it also sheds light on the predictions by sharing the top factors that influence the prediction.
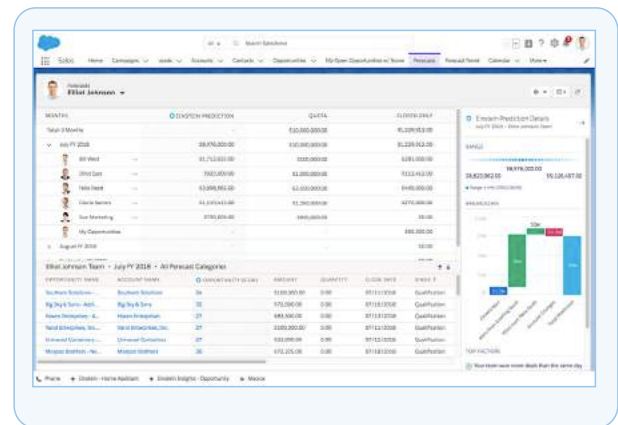
Now sales leaders have clear, objective guidance on where they can focus to improve their sales performance.

Einstein Forecast Prediction on Mobile
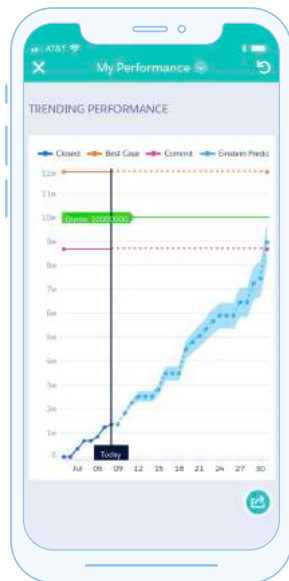
Einstein Forecast Prediction on Mobile

Einstein Forecast Tab on Desktop

Data Science That Works Automatically

Einstein Forecasting starts by analyzing all the fields in the Opportunity object, including how the records change over time and each sales rep and their unique attributes, such as their tenure and title, and also their forecasting tendencies (eg, it recognizes if a sales rep is a habitual over-committer... or sandbagger).

It analyzes and models the data in a unique, automated process called the Tournament of Models. This approach that employs several different algorithms to ensure the best

Top Benefits

- **Increase Forecast Accuracy**
- **Gain Insight into Forecast Factors**
- **Forecast from Desktop or Mobile**
- **Proactively Manage Forecast Changes**

Top Features

- **Forecasting Prediction KPIs** – Gain visibility into forecast categories via a waterfall chart and see a list of top forecast factors

- **Forecasting Prediction Graph** – Predict the business forecast at any point in time

Technical Specifications	
Data Sources	
Standard Fields	✓
Forecast Timeline	
Monthly	✓
Standard Fiscal Year	✓
Forecast Measurement	
Revenue	✓
User Experience	
Lightning Experience or Classic	✓
Mobile	✓
Requirements	
Collaborative Forecasts	✓
Amount field usage	✓
Opportunity Splits	Not supported
Opportunity data history	24 months
Calendar type	Gregorian
Starting month	Any

Einstein Activity Capture
Eliminate data entry and spend more time selling

salesforce sales cloud

In today's digital-first world, customers primarily communicate with salespeople by sending email: scheduling meetings, sharing information, and negotiating deals. In fact, the average rep spends 28% of their time reading and answering email.

Unfortunately, email doesn't connect to the systems companies use to run their business or to those they use to collaborate across teams. As a result, all too often the email and calendar events exchanged with customers stay trapped in inboxes.

At Salesforce, we understand the impact of this problem, so we built Einstein Activity Capture to solve it. Einstein Activity Capture automatically captures your team's business email and calendar data from any device directly to Salesforce – eliminating manual data entry and saving your team valuable selling time. All activity is visible in the Activity Timeline within Salesforce, providing context for your entire team so they can help close the deal.

Once your team's activity data is automatically flowing into Salesforce, Sales Cloud Einstein analyzes it using artificial intelligence. Machine Learning and Natural Language Processing algorithms uncover insights that guide sales teams to the next best action. These insights are then displayed clearly in email details, the Activity Timeline, in activity reports and in Inbox where they give sales teams an advantage when communicating with customers over email. Reps can even filter the Activity Timeline to focus on the most important moments in a deal or relationship.

How Einstein Activity Capture Works

Start by connecting a Gmail or Microsoft Exchange account, and Einstein Activity Capture will log historical emails and calendar events. After that, Einstein Activity Capture works in the background, capturing all relevant emails and calendar events. Each email and event is automatically associated with the right record, including Leads, Contacts, Accounts, Person Accounts, Opportunities, Quotes and Contracts.

Einstein Activity Capture Logic for Logging Emails to Salesforce

Depending on the recipient, emails and events are logged to the right record and show up in the Activity Timeline in two steps: First, Einstein Activity Capture checks if the email address is already associated with a lead or contact. Then, it removes any email that was blacklisted by the admin or user. Next it determines if the email address is related to a record via an Opportunity Contact Role or Account Contact Role.

If the opportunity has been closed for longer than 60 days, no new activities will be logged.

Sharing Settings and Privacy

To protect privacy and ensure confidential messages aren't shared across the organization, Einstein Activity Capture has built-in controls at the user and administrative levels. Users can adjust sharing settings to determine who in their organization can see the content of emails or events. Admins have another level of control; they can blacklist entire email domains or specific email addresses.
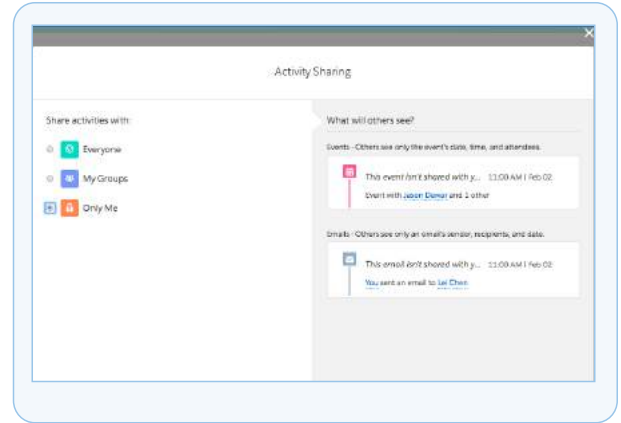
Top Benefits

- **Grow Customer Database Faster**
- **Increase Time Spent Selling**
- **Provide Data-Driven Sales Coaching**

Top Features

- **Automatic Email and Calendar Capture** – Log every email or meeting related to a Salesforce record created in G Suite, Office 365 or Exchange

- **Activity Reporting** – Provide data-driven rep coaching with an activity leaderboard

- **Fast and Easy Setup** – Connect to Gmail, Office 365, or Exchange, and Einstein does the rest

- **Sharing Settings** – Adjust who can see your emails and events to ensure privacy
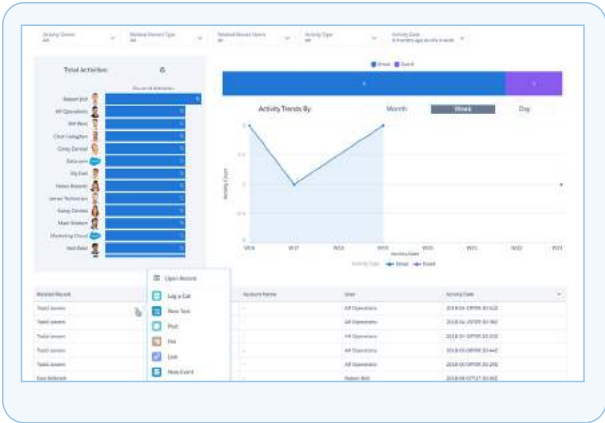
Einstein Activity Capture Dashboard

Einstein Activity Sharing Dashboard

Technical Specifications	
Requirements	
Activities Dashboard	Requires API access
Activities Timeline	Available in Lightning Experience and Inbox
Email Server Compatibility	
Gmail, Microsoft Office 365, Microsoft Exchange 2013 or 2016, and hybrid deployments of Microsoft Exchange	✓
Salesforce License Requirements	
Professional Edition (PE)	Standalone only. 100 seats included with Sales Cloud on Lightning, Professional Edition and higher. Additional seats require full Sales Cloud Einstein licenses.
Enterprise Edition Plus (EE+)**	✓
Historical Email Capture	
Google Gmail	Up to 6 months of past data
Microsoft Office 365	Up to 1 year of past data
Microsoft Exchange 2013 or 2016	Up to 1 year of past data
Email Logging to Object	
Leads, Contacts, Accounts, Person Accounts, Opportunities, Quotes and Contracts.	✓
Privacy Settings	
User Controls	✓
Sharing Settings	✓
Email Address and Domain Blacklisting	✓

Einstein Automated Contacts

Never type a contact record again

I magine the time you could save if you didn't have to manually enter contact data. Now it's a reality with Einstein Automated Contacts. Einstein Automated Contacts increases sales productivity by detecting and either recommending or automatically adding new contacts and contact roles in Salesforce. Simply connect your email and calendar t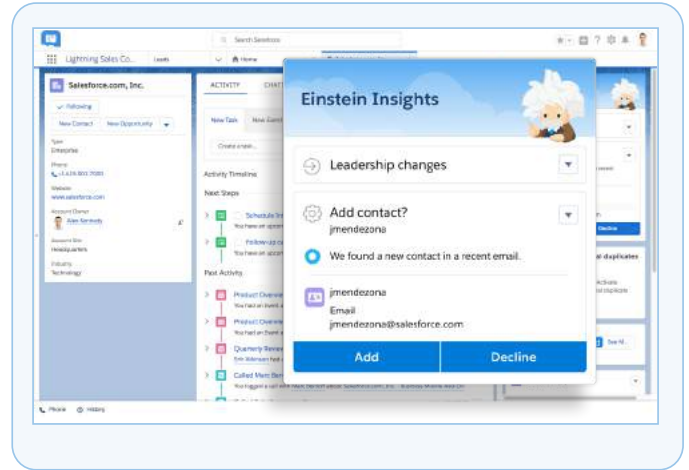o Salesforce with Einstein Activity Capture and Einstein will find new contact and contact role data. With Einstein Automated Contacts you can stay focused on selling, work faster by reducing time spent on manual data entry, eliminate potential typos, and have more complete Salesforce data.

"Einstein Automated Contacts reduced contact creation from two minutes to mere seconds."

Zenconnect

Einstein Automated Contacts Discovering a New Contact

How Einstein Automated Contacts Works

The Einstein Automated Contacts algorithm scans email signatures and email headers that pass through each sales rep's account to identify potential new contacts. It parses the information to capture the name, title, email address, phone numbers, and address. Then, it uses Einstein algorithms to match the information to existing accounts, and applies advanced heuristics to ensure the accuracy of the match. Einstein looks both at email activity with the specific contact and current open opportunities to determine whether the contact is active. Finally, it determines if a contact should be assigned as a new contact record and either adds it automatically or allows the sales rep to accept the new contact

Top Benefits

- **Drive Productivity**
- **Increase Data Accuracy**
- **Increase Data Visibility**
- **Increase Data Completeness**

Top Features

- **Fast and Easy Setup**
- **Available in Lightning Experience**
- **Fully Automated**

with a single click. And since Einstein creates a list view of all suggested contacts automatically, sales reps can take action directly from the list and managers can better understand which reps are managing their contacts effectively.

Technical Specifications	
Requires Einstein Activity Capture enabled	✓
Provides new contact and contact role suggestions (option)	✓
Adds new contacts and contact roles automatically (option)	✓
Supports Duplicate Management	✓
Manage in list views	✓

Salesforce Inbox
Bring email, calendar, and Salesforce together

salesforce sales cloud

When it comes to providing amazing experiences for customers, salespeople play a critical role. They are the front line, meeting with customers 1-on-1, uncovering business challenges, and recommending products and services that make an impact. In doing so, sales reps foster trust, build customer advocates, and ultimately generate revenue.

> "Sales reps want to focus more on selling. Sales managers want to measure sales performance. Salesforce Inbox is a win-win situation for sales reps and managers."

Michel Glezer
COO
Easy Taxi

Unfortunately, many salespeople cannot realize their full potential because administrative tasks take up most of their day. On average, sales reps spend 66% of their time on mundane things like searching for customer information, manually entering data, and scheduling meetings.[1]

As a result, sales reps either miss opportunities or ignore important but routine parts of the job like data entry. According to recent surveys, 89% of executives believe their sales teams are missing opportunities,[2] and 79% of opportunity-related data that sales reps gather never makes it into the CRM system.[3]

Mobile and Desktop Productivity Apps for Sales

What sets Salesforce Inbox apart from simple email integration tools? The answer is Einstein: artificial intelligence designed to help sales reps increase their personal sales productivity. With artificial intelligence at the critical juncture between CRM and email, Einstein Email

Insights flags the most important emails, while Recommended Connections identifies colleagues that have the strongest relationships with key gatekeepers and decision makers. And because Einstein is available in the mobile app, it helps your sales reps anywhere they are - even when they're on the go.

> "Absolutely saved time, helped us close business quicker, and identify new opportunities."

Sean Giancola
Chief Revenue Officer
New York Post

Top Benefits

- **Increase Sales User Adoption**
- **Spend More of Your Time Selling**
- **Access Customer Data When and Where It's Needed**
- **Sell Smarter, Anywhere**

Top Features

- **Insert Availability** – Secure customer meetings faster by eliminating scheduling friction
- **Read Receipts** – Know when customers are engaged and make timely responses
- **Einstein Email Insights** – Stay on top of every deal by prioritizing your inbox with AI
- **Recommended Connections** – Build deeper customer relationships by leveraging the power of your network

1. Docurated: "State of Sales Productivity 2015." 2015.
2. CSO Insights: "Impact of Big Data on Sales Performance: Why Big Data Should be a Big Deal for Sales." 2012
3. ESNA: "What Is Sales Really Doing With Their Time?" 2014.
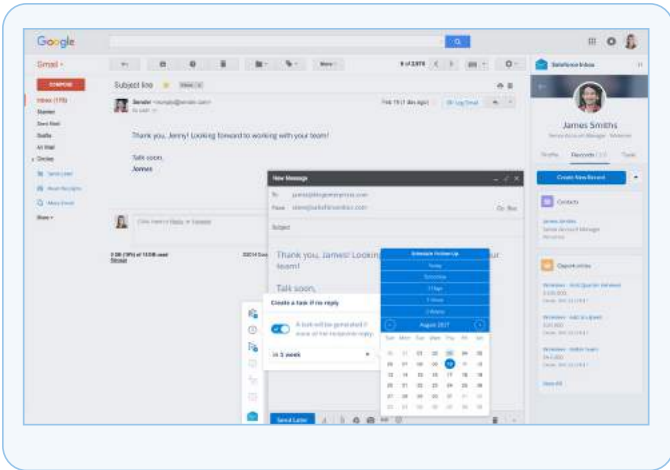
Salesforce Inbox Extension for Gmail
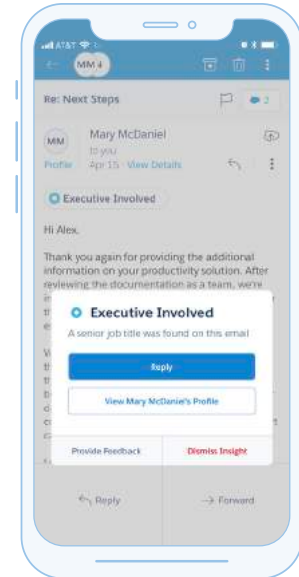
Email Insight in Salesforce Inbox Mobile App

Email Specifications	Gmail	Office 365	Outlook 2013	Exchange Hybrid	Outlook 2016	Exchange 2010	Exchange 2013	Exchange 2016
Supported Email								
Gmail Extension	✓							
Add-in for Outlook		✓	✓	✓	✓		✓	✓
Mobile Apps (Apple iOS and Android)	✓	✓	✓	✓	✓	✓	✓	✓
Email & Calendar Sync to Salesforce								
Einstein Activity Capture	✓	✓		✓			✓	✓
Lightning Sync	✓	✓					✓	✓

Technical Specifications	
Salesforce License Requirements	
Professional Edition (PE)	Available in some cases
Enterprise Edition Plus (EE+)*	✓
Email Logging to Object (via EAC)	
Leads, Contacts, Accounts, Person Accounts, Opportunities, Quotes and Contracts	✓
Email Logging to Object (manual)	
Leads, Contacts, Accounts, Person Accounts, Opportunities, Quotes and Contracts	✓

* You must have the Einstein Activity Capture (EAC) permission assigned to your user to see activities captured by EAC in the Activity Timeline in Salesforce. The EAC permission is available with a license to either Salesforce Inbox or Sales Cloud Einstein.

Sales Analytics
Make better decisions and close more deals

Sales Analytics supercharges your Salesforce investment and gives you the power to easily transform mountains of data into streamlined analyses so you can work smarter and make better business decisions. With Sales Analytics your team has easy access to configurable prebuilt reports and dashboards to get instant visibility into historical pipeline information, business trends, whitespace, Einstein scores, and other advanced analytics on any device.

> "Salesforce allows our business users to gain insights previously only attainable through IT."

Brian Wickham
VP Sales Operations
Houghton Mifflin Harcourt

Discover New Opportunities Whitespace Report

How to Get Insights

Sales Analytics delivers customizable, built-in dashboards, which automatically populate with your Sales Cloud data and give you instant access to all your KPIs. Dashboards include ready-to-use advanced analytics to help keep your sales team on track. And work faster by updating records and objects directly from Sales Analytics. Now everyone can instantly get personalized insight into all of the data, from any angle.

Sales Analytics applies to every use case:

Sales Reps

Sales reps can have smarter, more data-driven customer interactions, instantly unlock answers to key sales questions, and get guidance on next steps.
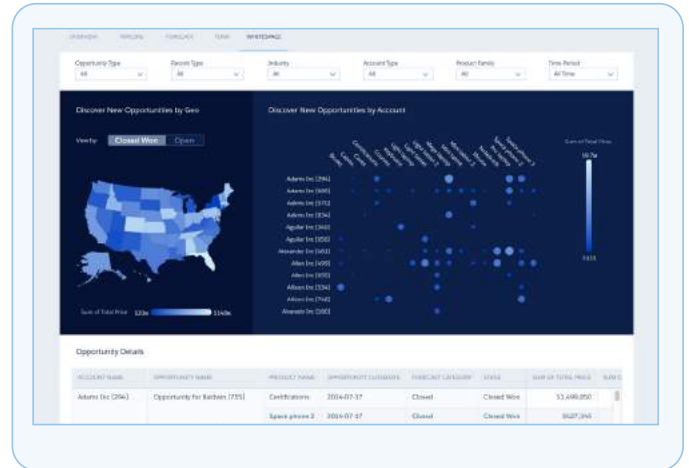
Sales Managers

Sales managers can better understand team performance against key KPIs (like quota attainment, pipe generation, bookings, and sales cycles) and see how the team stack ranks. Plus, they can get insight to identify habits of top performers, accelerate deals, and better coach every team member toward success.
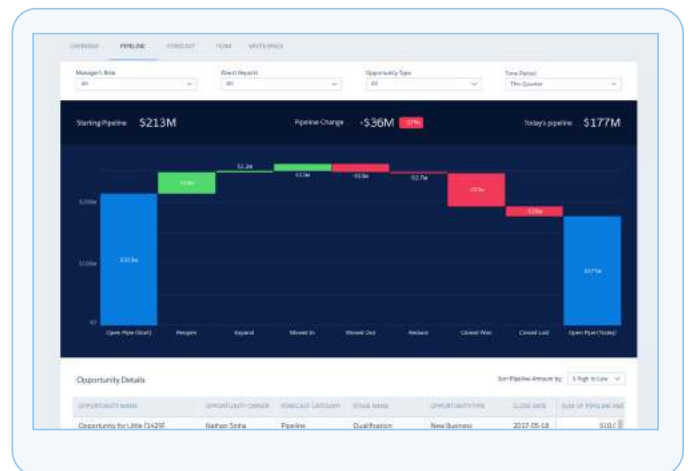
Sales Executives

Sales executives can get a holistic view of sales with dashboards for pipeline, bookings, and performance.


Pipeline Change Over Time

Sales Operations

Sales ops leaders can spot trends, evaluate opportunities, analyze historical performances, and identify new ways to optimize resources to make the entire team more efficient and uncover insight to provide better operational support.

Mobile-Optimized

You can only get so far when all of your analytics tools are desktop-only. With Sales Analytics, your employees have access to all of the data at their fingertips and can act on insights from anywhere. Sales Analytics' mobile-first design enables instant insight-to-action, on any device.
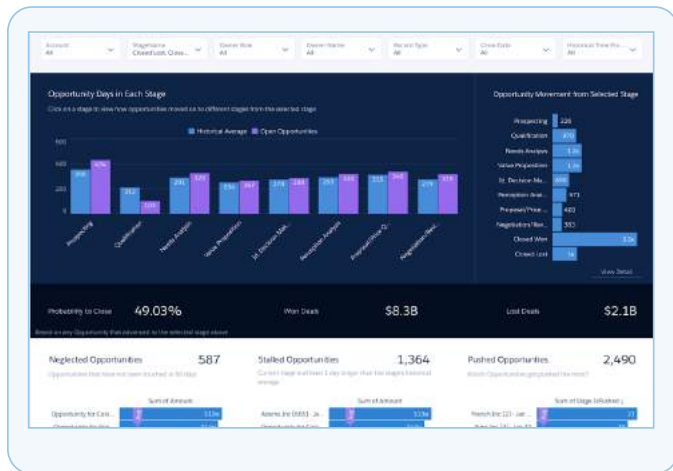
Sales Stage Analysis Dashboard

Salesforce Native

Since it's built natively on the Salesforce Platform, Sales Analytics gives you the advantage of massive scale and gets you up and running in no time with the same speed and security you already enjoy. Simply put, it's the best advanced analytics for Salesforce, because it's from Salesforce.

Top Benefits

- **Accelerate Sales Cycles**
- **Uncover New Opportunities**
- **Increase Sales Productivity**
- **Drive Sales Team Performance**

Top Features

- **Quick Setup** – Deliver dashboards and KPIs quickly
- **20 Prebuilt Dashboards** – Configurable dashboards to better visualize sales performance
- **40+ Prebuilt Sales KPIs** – Apply proven best practices

Technical Specifications	
20+ dashboards including Pipeline Trending, Whitespace Analysis, Team Performance, Collaborative Forecasting, Sales Stage Analysis, and Activity Tracking	✓
40+ proven, prebuilt KPIs	✓
Intuitive visualizations	✓
Edit and import any Sales Cloud data	✓
Ability to embed Sales Analytics in Sales Cloud page layouts	✓
Upload and edit your sales quota	✓
Use 25 million data rows and processing	✓

Sales Cloud Einstein includes Einstein Lead Scoring, Einstein Opportunity Scoring, Einstein Account Insights, Einstein Opportunity Insights, Einstein Activity Capture, Einstein Automated Contacts, Salesforce Inbox, and Sales Analytics. It is $50 per user per month. Existing customers with the Sales Cloud Lightning CRM SKU or Service Cloud Lightning CRM SKU EE/UE will be able to buy Sales Cloud Einstein. New customers will be able to purchase Sales Cloud Einstein with the Lightning Sales Cloud SKU and the Lightning CRM SKU at EE/UE. New customers will not be able to buy Sales Cloud Einstein with the Lightning Service Cloud SKU. Sales Cloud Einstein Summer '18 is available in English only. Native Pardot integration will be available in a future release.

For More Information
Contact your account executive to learn how we can help you accelerate your CRM success.

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