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# SALESFORCE SERVICE CLOUD GETS SMARTER WITH EINSTEIN

## ANALYSTS

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## THE BOTTOM LINE

On July 11, 2018 Salesforce announced new Einstein and Lightning capabilities for Service Cloud. Einstein Next Best Action leverages customer relationship management (CRM) data to enable business agents to make relevant, intelligent offers to customers in real time. Lightning Flow for Service allows companies to design and deploy automated wizards to guide customers through common processes, increasing productivity and allowing service staff to refocus their attention on providing the best customer experience possible. Customer-facing Einstein Bots can be used to automate common service processes by deflecting low-complexity queries to the system instead of to an agent. Einstein's combined capabilities can help companies achieve advanced customer service maturity, which Nucleus found can increase service agent productivity by up to 25 percent.

## THE ANNOUNCEMENT

On July 11, 2018 Salesforce announced new capabilities for Service Cloud, including artificial intelligence (AI) functionality in three key areas.

### EINSTEIN BOTS FOR SERVICE

Automated bots respond to customers queries immediately and can automate basic processes or gather relevant information before passing the case off to a human agent, who is equipped with the relevant communication trail to resolve the case. The bots can be customized and programmed to handle industry-specific situations, and the entire system is built on a Natural Language Processing (NLP) framework that can be supervised and is trained over time to improve. Automating the most common requests and the information-gathering portion of a service call allows customer service staff to spend their time more efficiently, handling only the cases too complex to automate.

### LIGHTNING FLOW FOR SERVICE

With Lightning Flow for Service, companies can automate and standardize business processes, so that guided service processes can be deployed anywhere to assist customers through self-service interactions or to direct agent workflow. By connecting company, customer, and situational data from across the Salesforce platform, businesses can deliver more personalized customer interactions and increase customer satisfaction. Standardized business operations lead to reduced errors in reporting, more accurate and compatible data, and more valuable insights in the future.

**Einstein's combined capabilities can help companies achieve advanced customer service maturity, which Nucleus has found can increase service agent productivity by up to 25 percent.**

### EINSTEIN NEXT BEST ACTION

Predictive AI analyzes CRM data to provide relevant contextual insights to business users delivered within the Service Cloud console to guide decision making in real time. By processing customer data during interactions, personalized offers can be extended to potential buyers, increasing the likelihood of making a sale. Likewise, using situational context, past actions, and historical data, the system can recommend actions to service

agents, increasing worker efficiency and accuracy. Next Best Action equips the non-technical business user AI-driven relevant and usable recommendations that can be easily delivered within the workflow and translated to relevant business action.

## WHY IT MATTERS

As we outlined in our customer service maturity model (Nucleus Research, *q202 – Achieving Intelligent Dynamic Service Maturity*, November 2016), the highest possible level of customer service maturity is defined as dynamic maturity which incorporates feedback from customers and community, multi-channel customer interaction, and real-time insights, guidance, and collaboration. AI is the key component of intelligent dynamic maturity, where a system can learn from incoming feedback and alter its actions accordingly without human interference.

With this release, Service Cloud facilitates the transition toward intelligent dynamic maturity, equipping businesses with guided self-service processes and AI-powered bots to automate common low-level queries and collect customer information. Nucleus found that businesses reaching intelligent dynamic maturity could expect increases in productivity up to 25 percent from service agents and increases of up to 21 percent from managers. We expect the new Einstein capabilities to increase productivity in two primary areas: through deflection as automated bots and self-guided processes allow customers to resolve low-level queries without agent intervention, and by reducing the time to resolution as the system equips agents with complete, relevant, and up-to-date information to resolve issues as efficiently as possible.

**Prebuilt CRM components that meet the data and process requirements of a specific vertical can reduce initial configuration costs between 40 and 60 percent and ongoing support expenses by 25 percent.**

AI has been integrated with CRM technology for many years, however, Nucleus estimates that only 30 percent of companies have successfully leveraged CRM data to achieve value and better serve customers (Nucleus Research, *q139 – Tying CRM to Customer Service*, July

2016). A significant obstacle to attaining value is customizing the available AI technologies to fit each company's unique CRM needs, usually requiring consultant or data science expertise to build out CRM-specific models, structure and scrub data, and train the models to deliver desired outcomes. Because Service Cloud Einstein is built on the Salesforce platform and optimized to execute common CRM processes using CRM data, customers avoid much of that initial time and cost.

We've also found that industry accelerators – prebuilt CRM components that meet the data and process requirements of a specific vertical – can reduce initial configuration costs between 40 and 60 percent and ongoing support expenses by 25 percent (Nucleus Research, *r119 – Industry Accelerators Increase CRM Value*, June 2017). Companies leveraging the prebuilt capabilities of Service Cloud Einstein with this new version are likely to experience similar benefits. We expect additional bot capabilities provided by Salesforce or its partners could further accelerate time to value with vertical or use-case specific bots and libraries.

## CONCLUSION

With this release, Salesforce makes intelligent dynamic maturity attainable to a broader set of customers. Unlike IBM and others, who offer AI functionality but require additional time, expense, and data science expertise to create effective service chatbots, Salesforce customers can now benefit from AI-backed CRM without the costly and technical setup that may have previously been a barrier. With the addition of Lightning Flow for Service and Einstein Next Best Action, the latest release of the Service Cloud platform can help Salesforce customers of all sizes accelerate time to value and achieve greater customer service maturity.