salesforce einstein analytics

GO FROM INSIGHT TO ACTION WITH EINSTEIN ANALYTICS

Collecting data is easy. Learn how
Einstein Analytics makes sense of it all.

# Are today's analytics tools slowing you down?

Chances are you have tons of data scattered across your organization: in spreadsheets, PowerPoints, reports, and in the dark recesses of siloed departments and databases. Making sense out of all that data – and getting fast answers to critical business questions – is challenging. Many business leaders spend hours updating spreadsheets or waiting for answers from IT. Analytics tools have been around for decades, but they're still designed for analysts, not the everyday business user. They're disconnected from the CRM system and fail to engage today's increasingly mobile workforce.

The solution lies in modern apps like Einstein Analytics, that pull all of your data into a single view and allow you to drill down, gain relevant insights, and take action right from where you work.

Start blazing your trail to get smarter about your customers.

Astro and friends will guide you through everything you need to know about Salesforce. With fun, easy-to-follow trails you'll be up and running in no time.

Find your path forward at **salesforce.com/trailhead**.

Manager Overview

Last 180 Days

Backlog

747
Open Cases

Review Open Cases

Review Backlog
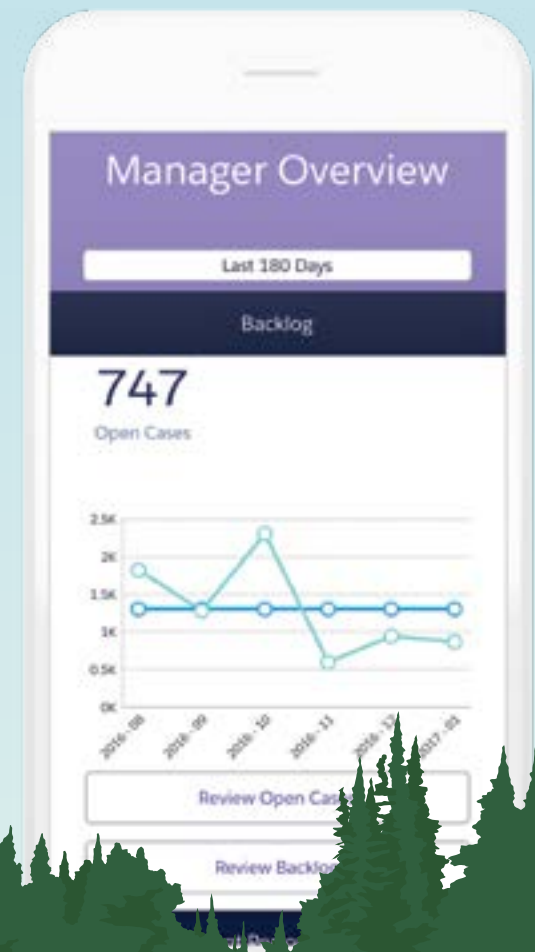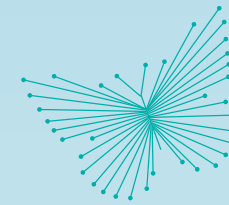
Einstein Analytics
Unlock critical sales and service insights, fast.

For many businesses, "big data" is a buzzword that's failed to deliver the actionable insights they need. Salesforce is changing all that. We brought Einstein Analytics to market so that Salesforce users can get fast, dynamic answers on any device, make smarter decisions, and explore any data.

What makes it work?

Salesforce native	Unlike legacy business intelligence or desktop discovery tools, Einstein Analytics is built native in the cloud, which gives you the advantage of massive scale and gets you up and running in no time. And because it's Salesforce, it has the same security and scalability you already enjoy. Embed dashboards across the entire Customer Success Platform to give your employees and partners a consistent view of actionable data and access to new insights.
Intelligent, predictive analytics	With AI-powered Einstein Discovery, it's like you have your own personal data scientist who is readily available to quickly sift through huge amounts of data, find the important correlations, and make accurate predictions. Once it's done analyzing your data, Einstein Discovery generates answers, explanations, and recommendations in a way that's easy for business users to understand.
Fast to deploy and customize	Quickly deploy prebuilt apps for sales, service, and marketing, or build custom apps for any use case, using any data source. Partner-built Einstein Analytics apps are also available in AppExchange, including apps for financial services, healthcare, retail, and government.
Intuitive, mobile-optimized experience	Analytics tools on the desktop alone will only get you so far. High-performing teams are 3.5x more likely than underperformers to extensively use mobile reporting tools to analyze data. With Einstein Analytics, your employees have access to data at their fingertips and can act on insights from anywhere.

Intensive users of customer analytics are

23x

more likely to outperform competitors in terms of customer acquisition than companies that do not utilize data.
They're also 19x more likely to be profitable.

McKinsey & Company

Survey Says ...

Don't take it from us. Check out what our customers have to say about Einstein Analytics.

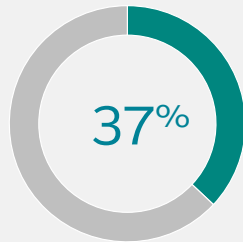75% of customers indicate positive gains with individual and team productivity.

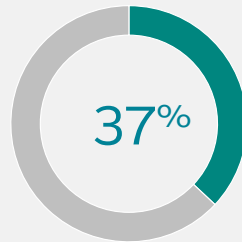Customers indicate a 19% gain in productivity since switching to Einstein Analytics.

Customers save an average of 11 hours per month per IT/sales/operations resource.
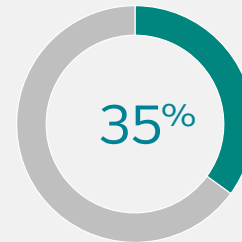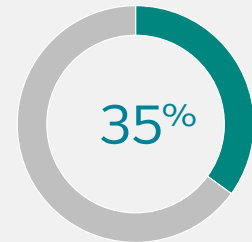
The most popular ways customers use data today:

37%
Drive operational efficiencies

37%
Facilitate growth

35%
Optimize operational processes

35%
Improve existing products, services, and features

The longer Einstein Analytics is used, the higher the productivity.

% of productivity gains based on previous tool used

Manual spreadsheets	16%
BI platform	18%
Data discovery tools	23%

"We have 400 sales executives, 40 directors of sales, and 160 curriculum specialists. Getting the right information to all of those constituents is nearly impossible without a tool like Einstein Analytics."

Hazel Hughes
VP, Sales Operations & Business Intelligence
Houghton Mifflin Harcourt

Sales Analytics

Turn Sales Cloud data into smarter decisions and bigger profits.

Sales Analytics gives your entire sales team instant visibility into all of your sales data and enables you to take action on the fly. Quickly pivot from identifying a new opportunity to creating a task, changing a close date, or sharing insights.

Crush the competition every day.

Selling is a team sport. Sales Analytics empowers sales operations, managers, and executives to collaborate, align, and optimize their effectiveness. The entire team benefits from clearer forecast visibility, improved opportunity analytics, and the predictive insights needed to boost revenue and reduce time to close.

SALES ANALYTICS

Dive deep into:

- Pipeline trending
- Forecast reviews
- Sales productivity
- Customer trends

- Closed/won business by geography
- Performance by product
- Performance by lead source

- Historical analysis
- Rep performance
- Account summaries
- Business review

Turn insight into performance.

With predesigned dashboards built for Sales Cloud data, sales execs, managers, and reps have the power to dive deep and explore, slicing and dicing data down to the individual record. It gives everyone in your sales organization the answers they need to make smarter decisions, faster.

With Sales Analytics …

Sales execs become deal accelerators.	Sales managers become better coaches.	Sales reps become quota-crushing machines.	Sales and operations leaders become mega-efficiency drivers.
With best-practice templates and centralized KPIs, execs can quickly pivot their strategy to build deeper relationships with customers and grow sales.	Managers get an overview of team performance against key KPIs like quota attainment, pipe generation, bookings, and sales cycle – and can use the app to track how team pipeline is changing over time, so they can focus on opportunities that have been pushed, reduced, or lost.	Sales reps can track their own activities, and benchmark against top performers to find white space and prioritize the right opportunities. Reps can also create and update opportunities, log tasks, or even send a Chatter message to their managers without ever leaving the app.	Sales ops can customize and build dashboards to deliver fast insight to sales and service.

![Houghton Mifflin Harcourt logo]

Houghton Mifflin Harcourt is expected to earn a five-year ROI of more than 200%, breaking even on its investment in Sales Analytics in less than a year.

"It's very important to have a one-to-one relationship with the customer, and that requires a deeper understanding of the customer beyond a series of transactions. Einstein Analytics has allowed us to grow more rapidly and to achieve our goal of becoming an increasingly responsive company."

Brian Wickham, Director of Sales Operations & Business Intelligence

Average time savings per month using Sales Analytics features:

Feature	Hours
White space analysis	9 hrs
Pipeline tracking	12 hrs
Dynamic dashboards	17 hrs
Native integration	11 hrs

Service Analytics

Turn your Service Cloud data into faster resolutions and happier customers.

Better service starts with a better understanding of customers' common needs and challenges. But if customer insights only come in the form of an annual survey or a quarterly focus group, your company cannot act on them quickly.

Service Analytics brings all of your service data into one place, empowering agents and managers with the insights they need to optimize service efficiency and turn customers into advocates. Disparate data points come together in dynamic dashboards that automatically surface the metrics that matter most to your company, giving you a true 360-degree view of your customers and your service operations.

Arm agents with the right insights at the right time.

Even your best service teams aren't mind readers. But Service Analytics brings them one step closer, giving them a deeper understanding of every customer. It goes beyond standard reports and dashboards to deliver the insights that matter in the moment – when that customer is on the line, face to face, or in the chat window. The result: faster resolutions, increased cross-sell opportunities, and big productivity gains.

With Service Analytics ...

Service agents become smarter, faster, more productive problem solvers.

Agents can drill into details to quickly diagnose service issues and find the best answers.

Service managers become trusted partners, in tune with team and channel performance.

Service managers can see critical KPIs like CSAT, average handle time, and first-call resolution in one place, so they can effectively coach their team and enhance channel optimization.

Service executives become better forecasters.

Execs get instant visualizations that show them how business is doing based on the latest data and can even gaze into the future to see what the coming months will bring.

High-performing service teams are

19x

more likely than underperformers to be outstanding at using analytics and insights.

2015 Salesforce Research study

SERVICE ANALYTICS

Dive deep into:

- Agent performance
- Predictive CSAT
- Case types
- Escalations

- Channel analytics
- Case duration
- FCR
- SLAs

- Calls per day
- Backlog causes
- Case volumes
- Knowledge analytics

Athenahealth increased agent productivity and reduced case age by 25% with Service Analytics.

"Einstein Analytics makes life easier by providing access to more information in the moment. It gives people the canvas and the functionality to bring in data from wherever they want, to be able to tell a story, and make decisions better."

Angus Lindsay, Director of Enterprise Technology

Einstein Analytics Platform
Customize and bring in outside data.

The Einstein Analytics Platform includes Sales Analytics and Service Analytics to increase performance and ensure adoption. It helps you unlock details on the usage, security, and performance data of all your Salesforce products and apps.

Import data from anywhere.

Bring in and blend data from your Salesforce orgs and external sources, like Amazon Redshift. Einstein Analytics gives you the prep tools to let you easily manipulate and clean data. The visual dataflow designer simplifies the entire process, eliminating the need for JSON.

Easily create and distribute applications.

Create unlimited analytics applications that are endlessly customizable to see the data that you need to make better business decisions.

Integrate Einstein Analytics into existing applications.

Einstein Analytics is designed to be API-first. And with the Analytics Web SDK you can extend functionality across Salesforce Lightning or any third-party website.

Ensure data security.

Einstein Analytics lets you control sharing and provisioning. It uses the same role hierarchy settings as your other Salesforce CRM products. Analytics Encryption at Rest maintains data integrity and gives you the multilayered security you can rely on from Salesforce.

vmware®

VMware gains visibility into the overall health of customers with Einstein Analytics.

VMware is committed to providing the company's customers with the best experience and support. Its customers range from Fortune 500 and government-owned companies to individuals. Regardless of customer size, VMware needed a tool that would allow company leaders to have a 360-degree lens of any customer, at any time. With Einstein Analytics, VMware can now gain insights into the overall health of its customers, allowing the company to provide even better support.

"Whether you are talking to a delivery person, a marketing person, or a salesperson, they truly understand your issues and challenges, and can provide solutions."

Chris Dials, VP of Global Operations

Smarter with Einstein

Get smarter and more predictive about your customers.

Your organization is sitting on massive amounts of data, but what good is it if you can't analyze and learn from it? Most complex issues have causes that weave through layers of interrelated variables, so just scratching the surface isn't enough. You need to drill down, and you need to know where to look. AI-powered Einstein Discovery does the heavy lifting for you, helping you find the right insights in your data and presenting them to you in simple stories. By uncovering key relationships and trends, you'll be able to act on your data – right from where you work – to close deals faster, optimize every customer's service experience, and unlock productivity for your entire organization.

Einstein Discovery analyzes millions of data combinations in minutes, giving you the whole story behind your data.

Instantly uncover answers to key business questions:

- What happened? Was it unusual?
- Why did it happen? What's the diagnosis based on the facts?
- What will happen?
- What are some effective options for dealing with the situation?

UnitedHealthcare achieved 400% ROI using Einstein Discovery to uncover the explanation behind rising case-rate costs.

"This tool better informs our decision-making and supports our ability to deliver on our commitment. Human biases can limit our discovery of unknown opportunities. How can we ask about what we don't know? Now we are letting the data speak for itself, and it is telling us about new opportunities."

Jeff Stafford, CFO, Kansas Medicaid

Through 2020, the number of citizen data scientists will grow

5x

faster than the number of data scientists.

Gartner

Find your Einstein Analytics app.

Whether you're a small ecommerce startup or an established manufacturing company, Einstein Analytics makes it easy to get insights from your data without the need for dedicated IT specialists.

Today, 20 new Einstein Analytics partner apps are available in AppExchange, empowering Salesforce customers with the insights they need to do their jobs smarter and faster.

Einstein Analytics helps marketing understand the customer's brand experience.

With B2B Marketing Analytics, marketers can get insight into marketing messages and signals that resonate in order to continually improve customer engagement. The Hilo Studios B2B Marketing Analytics app delivers interactive, actionable attribution and pipeline analytics, providing marketing teams with better visibility into campaigns.
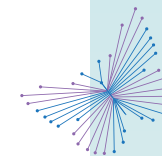
B2B MARKETING ANALYTICS

Dive deep into:

- Funnel analysis
- Campaign analysis
- Lead conversion rates
- Marketing channels

14hrs

Marketing professionals save 14 hours per month with Einstein Analytics.

Einstein Analytics helps IT proactively address application and infrastructure issues.

The CloudAware Einstein Analytics app gives CIOs and IT leaders insight on their cloud platform usage, including AWS, Azure, and Google, so they can analyze cloud infrastructure operations, cost management, governance, compliance, and security – while reducing IT costs and helping prioritize IT management initiatives.

INFRASTRUCTURE EINSTEIN ANALYTICS

Dive deep into:
- Idling resources
- Spending trends
- Insecure cloud configurations
- Vulnerability resolution rates

20hrs

IT resources save 20 hours per month with Einstein Analytics.

Einstein Analytics helps retailers prevent inventory theft.

ThinkLP's loss-prevention solution helps reduce fraud loss and risk for retailers. Actionable analytics enables teams to identify potentially fraudulent behavior, reduce inventory loss due to theft, and cut time to identify fraudulent behavior by moving from insight to action quicker than ever before.

RETAIL ANALYTICS

Dive deep into:
- Automated exception reports
- Store risk analysis
- Product loss analysis
- Incident and audit reporting

Einstein Analytics helps professional service teams keep client projects on track.

FinancialForce's Einstein Analytics app for professional services automation (PSA) delivers dashboards on every aspect of a service's business, with content tailored to every role from vice president to project manager. Multiple perspectives by customers, region, practice, and groups make it easier than ever to get business insights, take smarter actions, and improve overall predictability.

Einstein Analytics helps companies improve sales productivity.

The SpringML Lighthouse app gives sales leaders and reps easy-to-access, real-time insights they can use to improve forecasting accuracy, manage and prioritize opportunities, and set action plans to meet quotas and growth targets. It combines your business data with the power of machine learning to automate manual, error-prone processes that can drain a team's productivity and credibility – while identifying areas for growth.

PROFESSIONAL SERVICES ANALYTICS

Dive deep into:
- Project and account forecast
- Billings forecast
- Revenue treatments
- Milestone analysis

PREDICTIVE SALES ANALYTICS

Dive deep into:
- Growth forecasting
- Pipeline flow analysis
- Win likelihood and scoring
- What-if analysis

Join the growing army of citizen analysts.

Smarter business decisions have never been more within reach. Fueled by technology and expertise, Einstein Analytics apps provide solutions for every team, every line of business, every industry. Contextual, actionable, and mobile-first apps are here. And they're more relevant, more engaging, and more insightful than ever.

For more information or to see Einstein Analytics in action, contact your sales rep or go to salesforce.com/analytics.