

salesforce einstein analytics

# ELEVATING CUSTOMER INSIGHT WITH SALESFORCE EINSTEIN ANALYTICS SUCCESS GUIDE



Using customer analytics to improve the customer experience across touchpoints is proven to create enterprise value and brand differentiation. McKinsey recently found that organizations can see a 5%-10% boost in revenue by optimizing customer experience using analytics and integrating the customer journey<sup>1</sup>.

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**“By 2020, more than 40% of all data analytics projects will relate to an aspect of customer experience.”**

**- Gartner**

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In fact, companies championing the use of customer analytics are six times more likely to retain customers and seven times more likely to outperform their competitors on making sales to existing customers<sup>2</sup>.

Einstein Analytics, and Einstein Analytics apps, accelerate customer analytics initiatives with preconfigured integration to many of the systems of customer engagement you're already using today to elevate customer experience and maximize sales performance – including Marketing Cloud, Sales Cloud, Service Cloud, Community Cloud, and Field Service. Because of this seamless integration, front-line staff benefit from a single customer view and get deeper insights faster than ever before. This guide provides practical tips on how to get your customer analytics project off on the right track with Einstein Analytics.

Because customer analytics projects typically need to align customer metrics with organizational goals and initiatives across business functions, they often require strong collaboration within and across business teams to standardize on metrics. Customer analytics projects often uncover issues with underlying business processes that may affect segments of a customer's data, such as incomplete fields for certain regions or acquired businesses, requiring customers to interactively improve processes to gain more value from customer analytics.

1 The CEO guide to customer experience, McKinsey 2016

2 Five facts: How customer analytics boosts corporate performance, McKinsey, 2014



## CUSTOMER ANALYTICS: GROUND RULES FOR SUCCESS

We recommend the following foundations to accelerate customer analytics success:

- 1 Start small.**

Don't attempt to analyze every customer metric. Work with a department to understand what customer metrics they really need and which ones they need to track to move the dial. Identify a handful of top-level summary metrics and some more detailed actionable operational drivers.
- 2 Partner with business stakeholders.**

Successful delivery of customer analytics means working with the business owner. They're typically the ones who've been creating customer analytics reports with spreadsheets and manual extracts and are often closer to the customer. Projects driven exclusively by IT sometimes run the risk of missing the mark on the right metrics, so business user involvement is important to get a clear perspective on the data and customer metrics that matter.
- 3 Be agile. Be iterative.**

Old-style waterfall methods simply don't work with modern, fast-moving customer analytics projects. To avoid gridlock, get an initial cut on the data and metrics, and show it to the business. Get feedback, iterate, and check back with the business stakeholder soon after. Repeat. Prototype and be agile –there is no definition of done.
- 4 Use analytics to fix customer data and business process issues.**

Analytics isn't just about finding insights; Einstein Analytics can be incredibly useful for exposing issues with data, including some drill-down paths that don't have data because the underlying business process needs to be addressed. Looking at summary data and then drilling down often helps to identify them. Identify a data steward, slice and dice across varying granularities in Einstein Analytics, then go back and fix the issues with the data extraction – or communicate with the LOB teams to give them the opportunity to address the underlying business process.
- 5 Get feedback on organizational security.**

Organizational security centers around who can see what data, or what accounts, based on where they are in the organizational hierarchy, and is particularly important for customer analytics projects. Be sure to get feedback on your organizational security model design to ensure controls and reduce maintenance.
- 6 Question granularity.**

While you can load in the finest grain of detail, like individual clicks, or the most detailed products, it isn't necessarily useful for analysis. In fact, doing so may open privacy concerns or other issues - so align the granularity of data you are storing with what's necessary to balance both usability, performance, and privacy.

# CREATING YOUR CUSTOMER-360 SCORING METHODOLOGY

While methodologies differ between customers and industries, 360-degree customer analytics initiatives typically involve scoring methodologies that roll up metrics into an overall customer score (or set of scores) based on a summary of functional scores, which in turn are calculated by operational drivers.

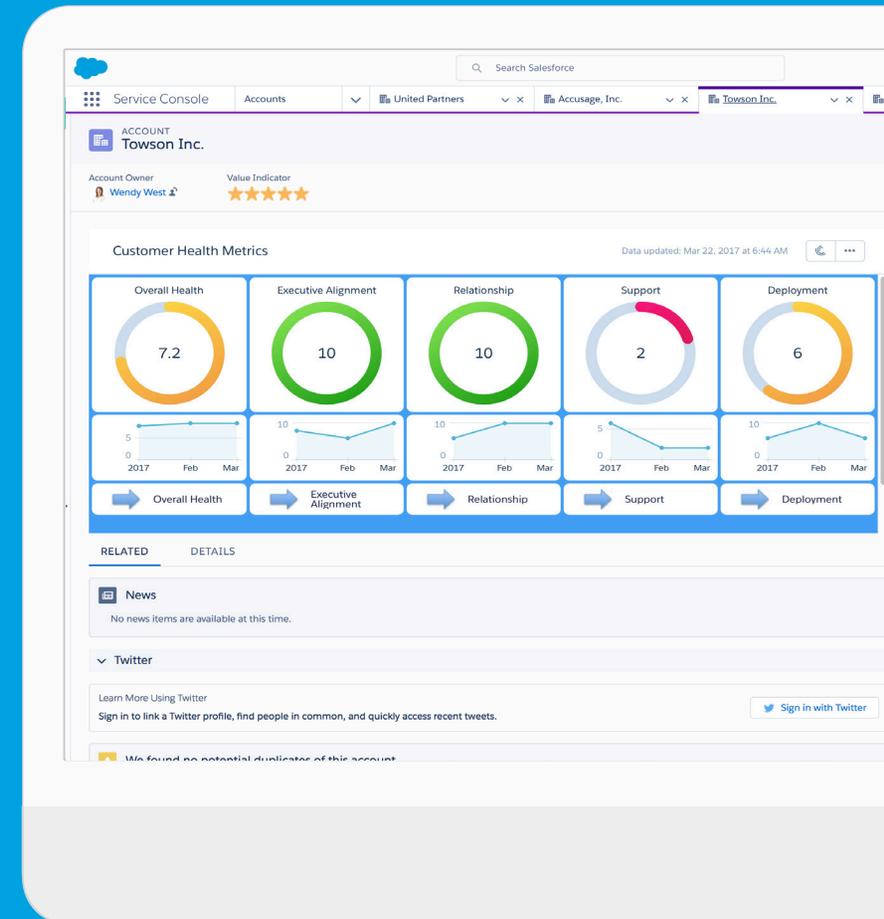
At the top level, a customer or account may have a handful of summary scores, such as “customer health score,” a function of underlying scores based on customer satisfaction, product usage, and size of deployment. Or they may also have a “customer strategic score,” a function of pipeline, bookings, and renewals that is indicative of their overall importance to the organization.

Both top-level summary scores taken together can provide an instant view into how important customers are to the organization, as well as their relative risk. They also provide a helpful perspective for creating overall aggregate customer-ranking reports, such as “Show me all the most strategic customers that are at risk” for customer success teams to focus on, or alternatively, “Show me the happiest strategic customers,” which is important for customer or sales referencing.

With any customer analytics initiative, it’s important that the organization agrees on the top-level scoring criteria and how they are aligned with the organizational structure and goals.

Each overall customer score, such as “overall health,” breaks down into functional scores. This provides a drill down for stakeholders to identify why the score is as it is, based on individual scores such as “executive alignment,” “support,” or “deployment” in the example above.

As part of an implementation, Salesforce typically works with customers to help define the overall scoring method, and the key functional areas that they wish to use to measure a customer, and then identify the underlying operational drivers.



A customer scorecard showing an overall customer score and four underlying functional customer scores

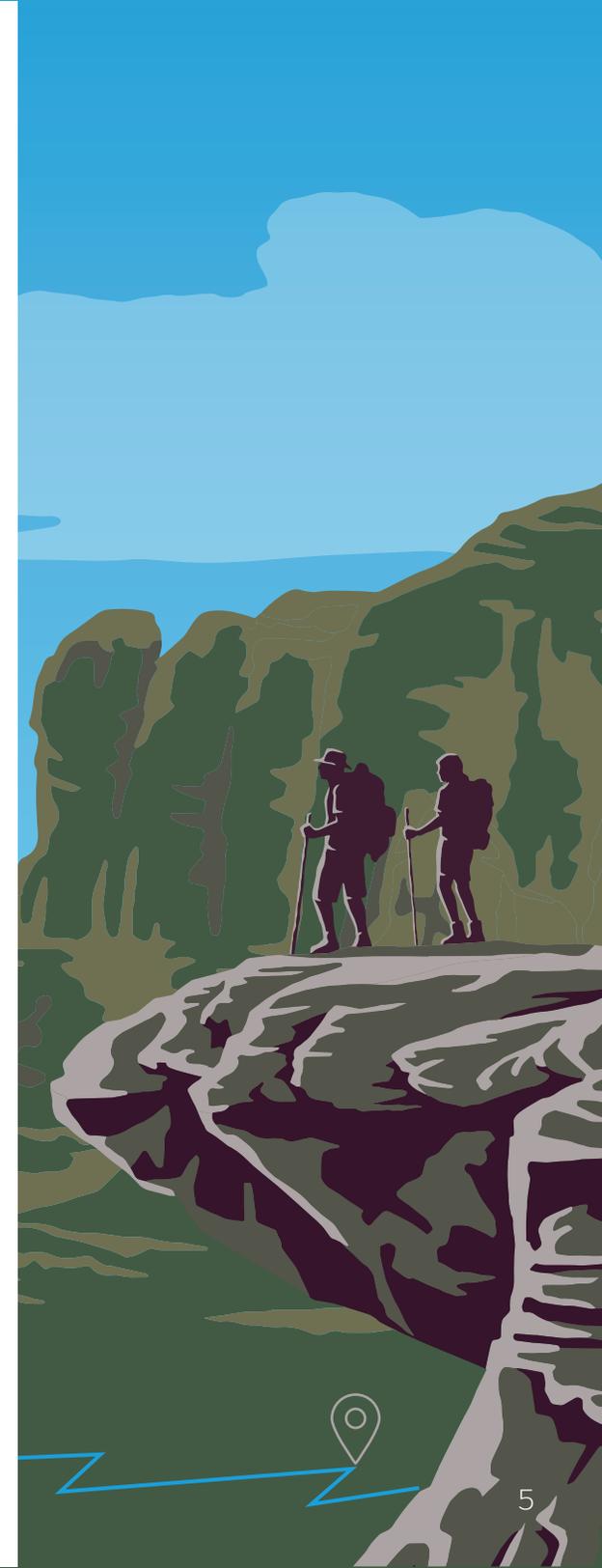
## Creating a tiered model and standardized metrics provides several benefits:

- Each customer has a small set of overall summary scores that provide ease of ranking and an instant at-a-glance rating of the customer for front-line workers. Slicing and dicing based on attributes such as industry, region, or other areas also enables teams to tease out issues within certain customer populations or segments.
- By creating underlying functional scores behind summary-level scores, Einstein Analytics users can drill down into high- or low-scored customers to track functional trends or exceptions and begin to see the root causes behind issues.
- Standardizing metrics and methodology ensures everyone is talking the same language across departments, from the ground floor to the executive team.
- Summary and functional scores can be trended over time and used to create notification and exceptions based on variances or thresholds to identify stakeholders on customer-level or aggregate-level issues.

## Customer scoring and Einstein Analytics together can be used to notify customer stakeholders on relevant trends

- Further, underlying functional drivers, such as “support,” can be underpinned by operational customer metrics that provide the most detailed level of drill down from a customer analytics perspective (before navigating into the transactional detail). Operational customer drivers in sales include metrics like sales pipeline, forecast, and forecast variance, or in service, metrics such as average handle time (AHT), first-call resolution (FCR), and customer satisfaction (CSAT) score. All provide the perfect jumping-off point to act on data.

Sales, service, and marketing analytics applications provide prebuilt integrations, metrics, and scorecards for operational customer metrics to fast-track the process of customer scoring and building a 360-degree picture.



## Case Study: Salesforce on Salesforce

### Tiering customer analytics metrics provides a foundation for success.

At Salesforce, analytics have become the vehicle of choice to improve departmental collaboration and drive customer experience. The focus: Break down silos to improve the customer experience even further. Srinivas Vemuru is part of the Salesforce team that focuses on driving analytics initiatives. Vemuru manages analytics for marketing operations at Salesforce and has spent 15 years working with Fortune 500 companies. One of Vemuru's goals has been to make Salesforce's data warehouses for sales, marketing, and financial reporting accessible to more of the team across all functions, from product line owners to campaign managers.

Vemuru's focus was twofold. First, use Einstein Analytics to add a layer of consistency for ad hoc analysis. Consistency was incredibly important so everyone could speak the same language by using the same data sources – thus one definition of the metrics and insights. Another focus was to get a complete perspective of customer experience across the funnel. “We always measure everything through a funnel – how many people come to our website, how many convert to leads, how many of those convert to opportunity, and how many convert to customers,” said Vemuru.

The tactic for getting the metrics aligned to the corporate metrics at the departmental level was to embed one of Vemuru's team members within each department. Marketing was one of the first departments. He did this so that his team could see how reports were being used and how the line of business used the data. Vemuru summarized the strategy: “The idea when we built this was to gather and agree on two different kinds of metrics. One, more enterprise-level metrics, where they are common across Salesforce, and one which is more departmental specific.”

Many organizations, when beginning a project like this, start with the data, but Vemuru decided to start this project by focusing on the core company metrics. First, he defined the high-level corporate metrics and created a basic standard definition of everything from annual contract value (ACV) to sales pipeline. “One of the major exercises we did when we were implementing Einstein Analytics was to partner with marketing, sales, and finance, and say that rather than building out one dataset and our own definitions of pipeline and bookings and ACV, we want to ensure that there would be a single definition for it, and everybody would use the same dataset,” he said.

The result was an Einstein Analytics dashboard and framework with three levels of cascading metrics – corporate, departmental, and operational drivers. This framework created vertical and lateral alignment between teams, which was key to breaking down silos across the company.

Another important benefit of collaboratively defining metrics and getting everyone on the same page has been employee engagement. There has been a consistent 200% year-over-year growth in analytics usage. Measuring monthly active users (MAU) has been the key metric to monitor usage. Engagement MAU spikes indicate success for each Einstein Analytics line-of-business deployment, and spikes have occurred in finance, marketing, and service. Most recently, an updated rollout of rep and manager dashboards have been driving usage within the sales line of business.

## Questions to ask around customer-360 methodology:

- What are the core functional categories and scores you'll use to derive your overall customer score?
- How is the scoring aligned with corporate goals?
- What is the goal of the customer scoring project? Is it to predict churn? To increase cross-sell and upsell? Increase satisfaction and customer brand advocacy?
- Will all the functional scores have the same weighting?
- Will you have different scoring methodologies based on customer type?
- What are the underlying drivers behind each functional score?





# FUNCTIONAL DATA INTEGRATION

The foundation of any customer 360-degree analytics projects rests on data, whether marketing, sales, service, financials, product usage, or other areas, as well as survey data. All this data is vital to provide insight into satisfaction and churn risk.

The biggest challenge behind most customer analytics projects is data integration - from unlocking data from source systems to ensuring it is merged and transformed and the underlying data contains the right and consistent attributes.

In fact, a recent Forrester report noted that data integration can consume 80% of the time and effort in customer analytics projects<sup>3</sup>. Often, it's because achieving a comprehensive customer score requires extracting data from multiple applications. For example, a study by Ventana Research found that a typical customer analytics project can require accessing data from six different functions, and many analysts work with 14 different types of data<sup>4</sup>.

Einstein Analytics speeds data integration to core systems of integration like marketing, sales, service, field service, and community using point-and-click integration. And because each of the Salesforce clouds are built around the same customer account record, together with prebuilt integration, Einstein Analytics is an important accelerator for customer analytics initiatives.

<sup>3</sup> "The Forrester Wave: Customer Analytics Solutions, Q1 2016," March 7, 2016.

<sup>4</sup> "The Next Generation of Customer Analytics: Using Analytics to Optimize Customer-Related Activities and Processes," Ventana Research, 2014.

## Sales Cloud

When you create the Sales Analytics app, the built-in configuration wizard checks the data in your org and builds a series of questions and default and recommended answers based on that data.

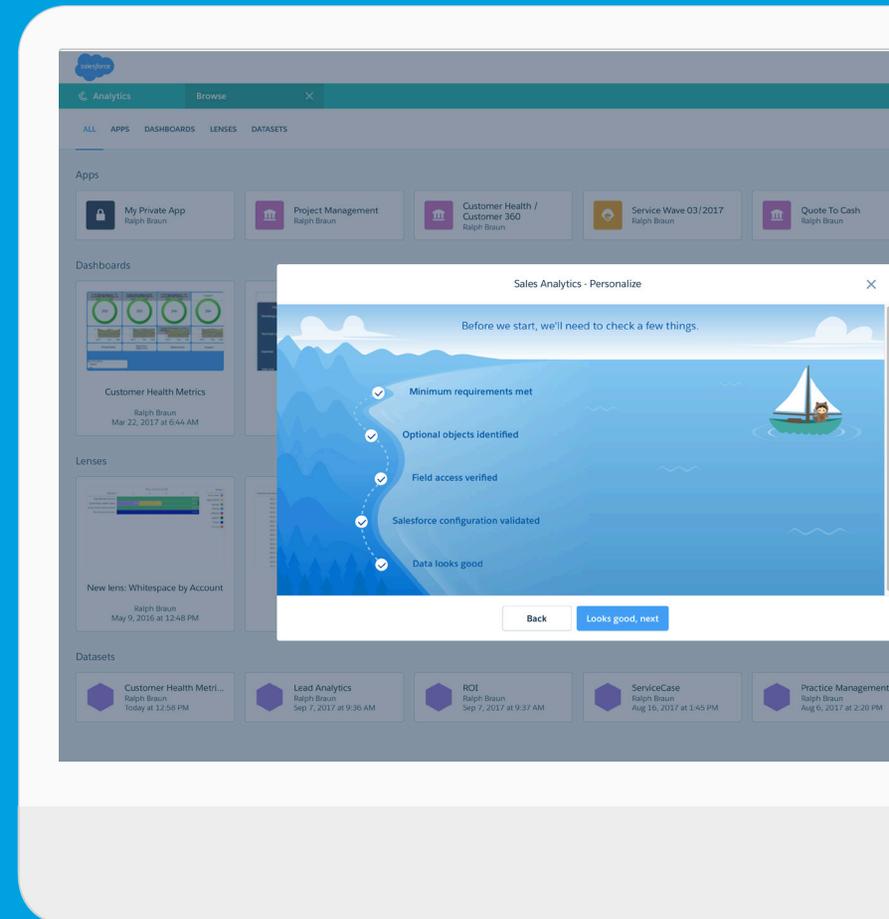
It starts with two pages of basic questions about how your organization uses the Salesforce accounts and opportunities objects. For example, in one of the questions about opportunities, you're asked if you use the products object. If you answer yes, you see a page with questions about how you use the products object, as Sales Analytics checks your org to be sure your data supports the answers you select. As a result, account-level data can be pulled into Einstein Analytics with ease and without coding.

## Service Cloud

When you create Service Analytics applications, the built-in configuration wizard checks the data in your org and builds a series of questions and default answers based on that data. Simply choose the metrics that are important to your organization and how you measure customer service, such as the duration of cases, how quickly they're resolved, if they're resolved within the bounds of any service-level agreement (SLA), and how you prefer to drill down into data about the status, severity, owner, reason, and type of cases. Service Analytics also makes it easy to configure how displays treat service cases' channels of origin, including whether or not they're resolved at first contact, as well as customer satisfaction (CSAT), use of knowledge resources and telephony, and whether cases are attached to sales opportunities.

## Marketing Cloud

In B2B Marketing Analytics, a Salesforce admin can enable Pardot to push data into Einstein Analytics via the API and also enable connectivity to external and third-party marketing data sources. Once Salesforce setup is complete, a Pardot admin can navigate to "Reports > B2B Marketing Analytics" and click "Yes!" Activate B2B Marketing Analytics - it's that easy.



*Sales Analytics provides Q&A-based integration to speed customer analytics*

## Field Service

If your org is enabled to use Field Service Lightning and its new standard object model, then enabling Field Service Analytics is simple. Set Salesforce field-level security to enable the Einstein Analytics Integration User to see all fields you'd like your app to include, then create a new app using the Field Service Einstein Analytics template in Einstein Analytics – the integration of customer account-level field service data is handled for you.

## Financials

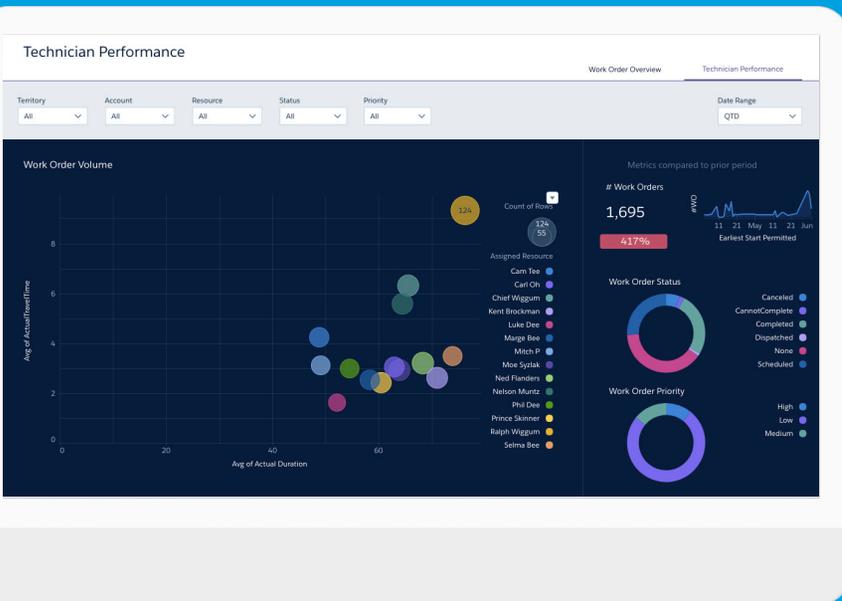
You can integrate external customer data (data that resides outside of Salesforce) such as data from a third-party ERP or accounting system or spreadsheets into Einstein Analytics to enable users to explore and visualize the data with explorer and designer. When you load data into Einstein Analytics, you load it into datasets. A dataset is a collection of related data that is stored in a de-normalized yet highly compressed form.

You can either upload external customer data through the user interface or through the external data API, using data integration tools such as Informatica, Jitterbit, or SnapLogic to create a dataset. When you upload an external data file (in .csv, .gz, or .zip format), you can also provide a metadata file. A metadata file contains metadata attributes that describe the structure of the customer data in the external data file – such as which fields are metrics, dimensions, hierarchies, and other areas.

As part of a customer analytics implementation, the project team will work on integrating external customer financial data with Salesforce data to achieve an integrated customer view.

## Product

Typically, customer product usage data is sourced from both the customers' own account records as well as from their proprietary application logs. Product usage data can be used to analyze customer engagement with your product or service to identify churn risk and opportunities for expansion. For example, metrics around number of active users versus available users can provide an early warning about opportunities for customers to get more value from your solution or whether more training is needed. Customer product engagement data is sourced using the same methods described above for integrating external data.



*Field Service Analytics integration provides visibility into account level field service performance*

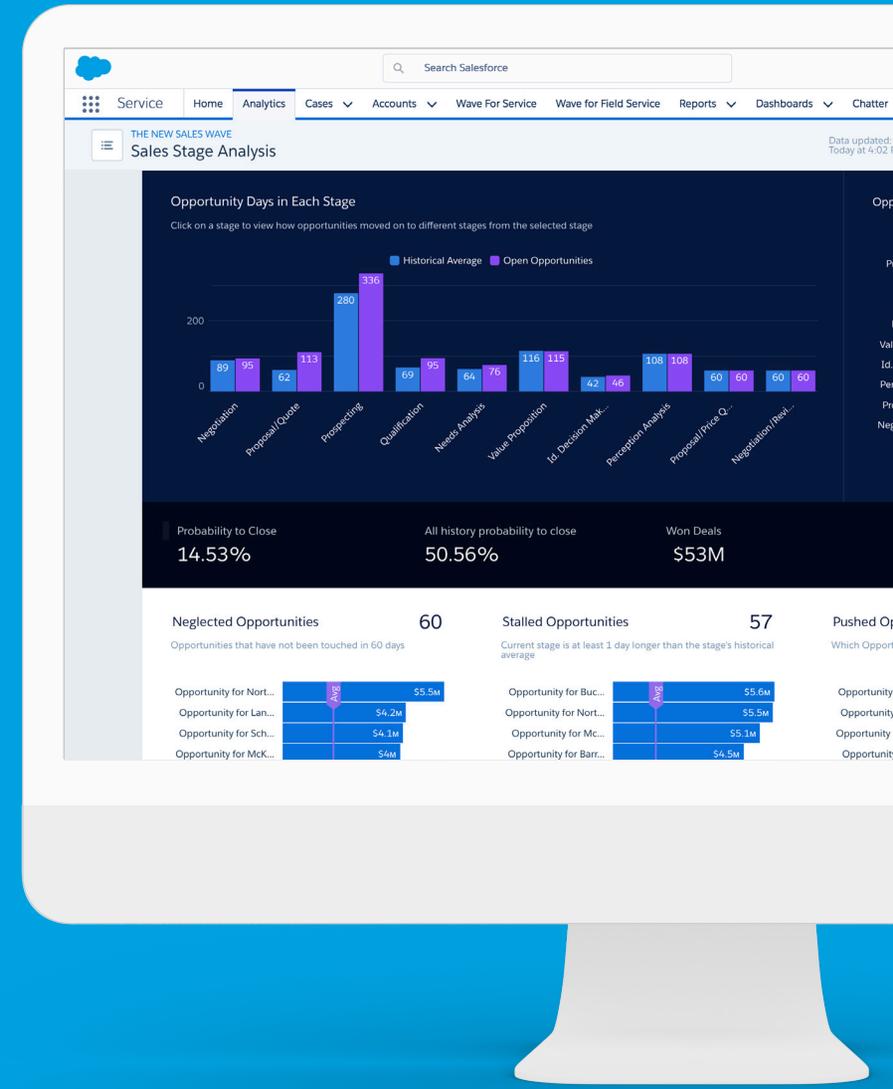
# OPERATIONAL CUSTOMER DRIVERS

Below, we provide an example list of operational drivers, many of which are provided for within discrete Einstein Analytics applications, all centered on a unified Salesforce account record, to maximize the customer 360-degree view.

Functional Area	Account Operational Metrics	Data Integration
<b>Marketing</b>	Campaign engagement New leads New MQLs	B2B Marketing Analytics
<b>Sales</b>	Quota attainment (if per customer) # sales activities / opps Products sold / not sold Open upsell sales pipeline Pipeline change (in/out of pipeline) Booked revenue Discount level	Sales Analytics
<b>Service</b>	Customer satisfaction (CSAT) First- call resolution (FCR) Average handle time (AHT) # Escalations # Open cases Defects logged	Service Analytics
<b>Field Service</b>	Open work orders Closed work orders SLA compliance	Field Service Analytics
<b>Engagement</b>	Community activity Product feedback Social sentiment	Community Analytics
<b>Product</b>	# seats being used # of customer logins	Custom integration with customer product
<b>Financials</b>	Bookings Annual recurring revenue (ARR) Non-recurring revenue Total contract value (TCV) Licenses / seats purchased Invoices outstanding Renewals	Custom integration with ERP system or via ISV integration

## Best Practices for Utilizing Operational Drivers

- Use Einstein Analytics action framework to enable operational action to be taken based on trends or exceptions such as creating a case or an opportunity based on an insight.
- Create role-based dashboards within each functional area geared toward specific personas. For example, in service, customer dashboards can be set up geared specifically toward sales managers and service staff. Einstein Analytics apps provide prebuilt and configured role-based dashboards for marketing, sales, service, and field service.
- Embed analytics with systems of engagement to ensure customer metrics can be used at the point of decision.
- Continually evolve customer processes to improve data and customer segmentation criteria.



# MAXIMIZING CUSTOMER ANALYTICS

## BEST PRACTICES

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“Culture makes adoption possible. And from the moment your organization embarks on its analytics journey, it should be clear to everyone that math, data, and even design are not enough: the real power comes from adoption. An algorithm should not be a point solution—companies must embed analytics in the operating models of real-world processes and day-to-day work flows. Bill Klem, the legendary baseball umpire, famously said, “It ain’t nothin’ until I call it.” Data analytics ain’t nothin’ until you use it.”

-McKinsey

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### Embed Analytics at the Point of Customer Engagement

While providing analytics is clearly a driver for customer satisfaction, retention, and value creation, it’s for naught if it’s not adopted pervasively in the systems of engagement. Embedding analytics within marketing, sales, and service apps systems, and making it easy for customer facing employees to act on them, ensures adoption – and adoption drives results.

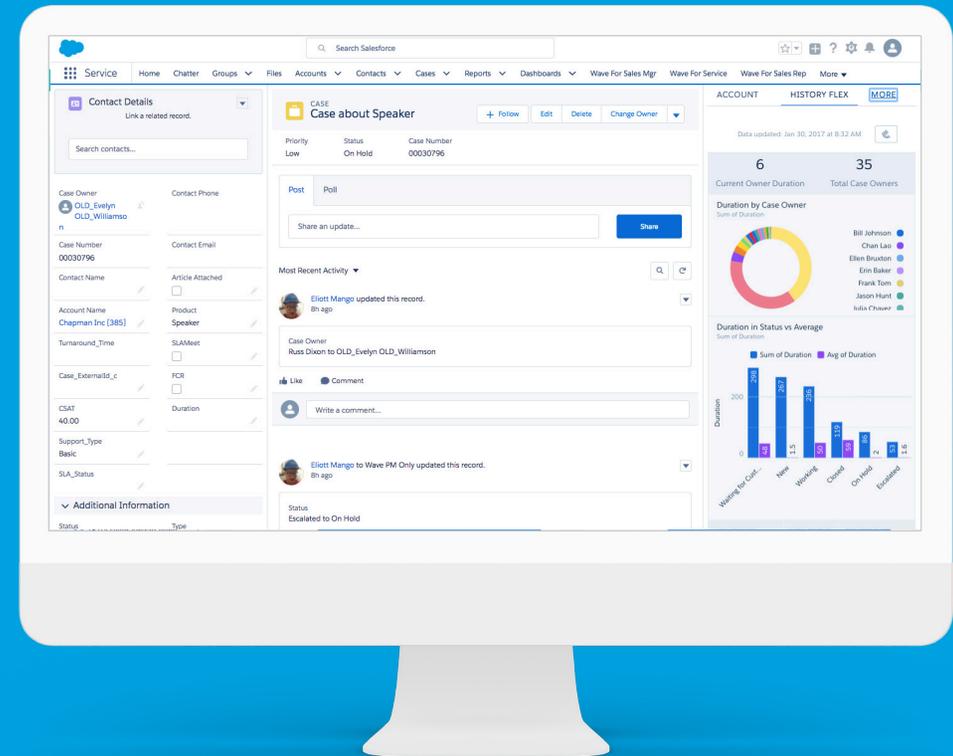
For example, to equip your sales and service team with analytics they’ll use to make decisions, it’s crucial that it’s embedded in their daily workflows. It means embedding analytics in opportunities, cases, and customer records so they can make upsell, renewal, and escalation decisions, or steer the conversation at the point of engagement. With Einstein Analytics, data is automatically filtered based on the account being viewed and is supported in both Lightning and Classic.

For example, Service Analytics includes three specialized dashboards—called sidebars—to give service agents instant access to visualizations of data about their customers and cases.

- The By Customer sidebar gives agents a snapshot of their customers, including products, case reasons and priority, and CSAT.
- The By Similarity sidebar shows data about previous cases so agents can guide customer interactions based on what they did in similar cases.
- The By Case History sidebar provides a quick view of the lifecycle of a case so agents can be informed during customer conversations.

Administrators can embed them in a Salesforce page so agents can access Service Analytics seamlessly while they carry out their normal case work. For example, if your Salesforce deployment makes the Service Cloud available through a service console, that's an ideal place to embed the sidebar dashboards.

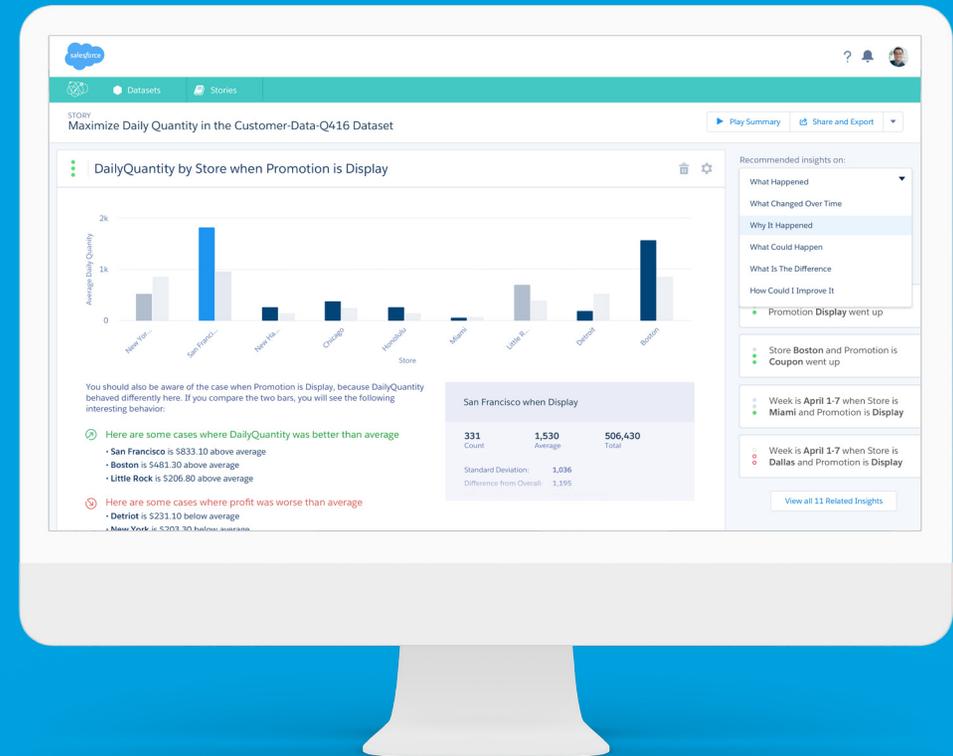
The same kind of embedded customer analytics is available for sales, too. For example, we've optimized the Sales Analytics Account Summary and Opportunity Summary dashboards to be embedded in the Salesforce Account page layout.



## Use Einstein Discovery to Identify Customer Insight

Customer data is some of the most highly attributed data in the organization, with endless ways to segment data using attributes across different customer touchpoints. While conventional dashboards and scorecards provide an ideal set of guideposts for steering customer engagements using metrics, finding deep insights in this kind of data can often be challenging using conventional tools. The problem is that there are so many combinations for analysis, and data analysts will often only hunt for insight on the likely paths or look for areas where they have bias, potentially ignoring fruitful yet hidden opportunities.

Using data science to help guide data discovery is where Einstein Discovery can help. Einstein Discovery enables business users to automatically discover relevant patterns based on their data – without having to build sophisticated data models. It helps users find and explain insights from millions of data combinations in a matter of minutes. It's like having a personal data scientist who is always available to quickly sift through huge amounts of data to find the important patterns and make accurate predictions. Once it's done analyzing your data, Einstein Discovery generates natural-language answers, explanations, and recommendations in a way that is easy for business users to understand.



## Case Study: Fortive Corporation

### See What Our Customers Are Saying

A global manufacturer, Fortive is one of Washington's largest public companies – with over \$6BN in revenue. Like any world-class manufacturer, it's focused on relentlessly improving customer profitability. Recently spun off from manufacturing conglomerate Danaher, the 21-business-unit force behind brands like electronic instrumentation from Fluke Corporation, auto tools from Matco, and gasoline dispensers from Gilbarco., Fortive has a complex customer and data landscape with tens of thousands of products and thousands of distributors buying their products and building them into their own products, using data from Salesforce and other financial and operational systems.

After over two months of wrangling data and using the typical tools trying to look for insights and find powerful recommendations to take back to the team, the company used Einstein Discovery, combining data science with data discovery to ask every possible question around metrics like margin and evaluate all the variable combinations –both the obvious and the not so obvious. It's especially valuable for wide data sets with many attributes that are often difficult to analyze using conventional tools.

Using the new approach, Jonathan Wray, Director of Pricing & Special Projects, ran into a conclusion that simply didn't make sense. "Einstein Discovery was telling us that there was a margin problem for customers that had embarked on new design initiatives where we'd engaged the decision makers in the process," Wray said. It was a counterintuitive conclusion because these were exactly the right kinds of customer engagements that any manufacturer should seemingly aggressively pursue.

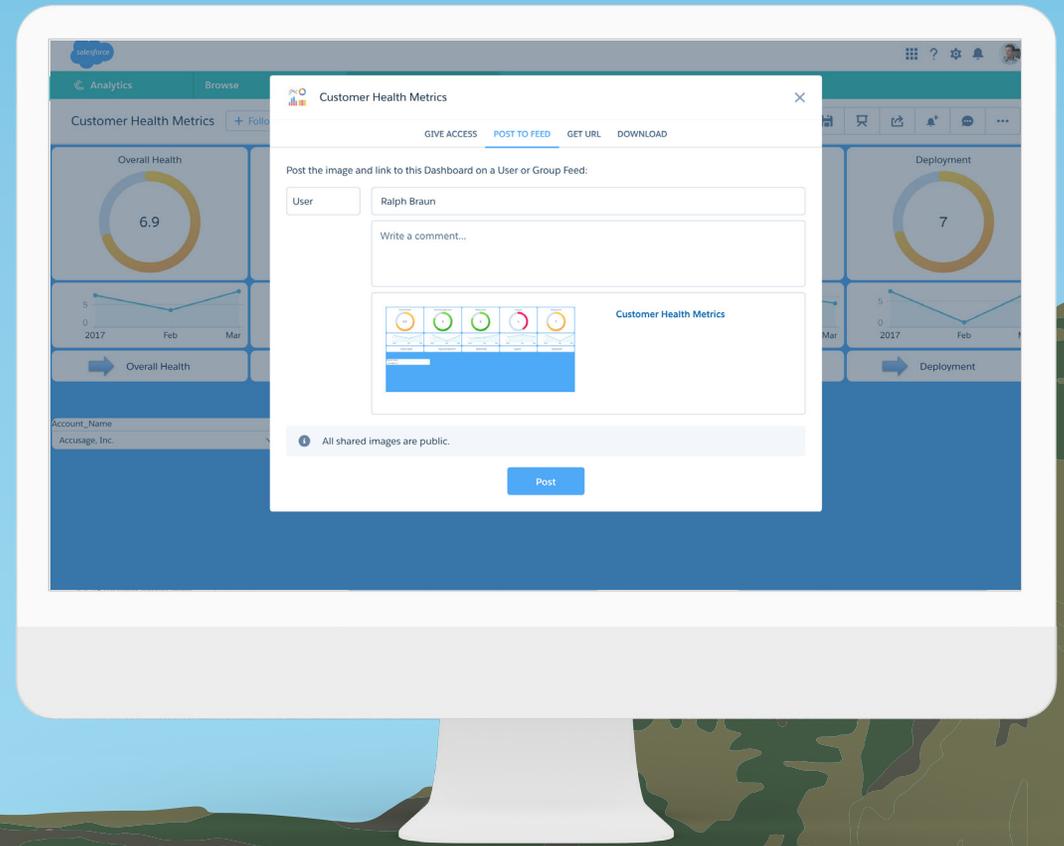
After drilling down, the result was an additional variable that

the team had never considered at the outset but Einstein Discovery had put into play for analysis: customer size. For smaller customers like startups, the decision maker was naturally much more likely to be engaged, but, ultimately, it's a higher-risk proposition because startups are typically less able to predict future business compared to their larger counterparts. While Fortive was winning the deals with startups, even though traditional future margin indicators were positive, they were turning out to be much less profitable than previously assumed because of project risk.

"Before Einstein Discovery, we weren't looking at every margin influencer because you must have a hypothesis before you start," Wray said. "There's simply no way a human being can practically look at millions of variable combinations -let's not ask them to do that." And for traditional machine learning, "there is no way if a machine doesn't explain its thinking, and human beings are tasked to validate it, that you can be effective either." With results in hand, the resulting ROI is now north of 700% and trending higher.

## Make Acting on Customer Insight Simple

Sales, service managers, and agents are primed to act. After seeing an issue such as an untapped upsell opportunity, or an aging case, analytics should enable a sales manager or a service agent to immediately be able to create an opportunity or task, update a case or forecast, or even share and collaborate with other team members. Managers need to not just be able to identify opportunities, service issues, cases, or customers at renewal risk, they need to be able to drill down and make changes to opportunities or service tickets and tasks required to act. The action framework in Einstein Analytics enables them to create tasks, engage in collaboration, or schedule follow-up calls, leaving no daylight between insight to action.



## Iterate and Continually Improve Customer Data and Process

One of the biggest barriers to customer analytics, and using it to improve customer experience, is often data— both integrating it and ensuring that the fields for analysis and segmentation are well-populated and well-organized for analytics. In fact, a recent article from Harvard Business Review saw integration as the #1 challenge to success.

Einstein Analytics provides preconfigured integration to standard Salesforce fields to minimize the need to spend time on integrating marketing, sales, and service data for analytics. It frees teams to focus on ensuring customer data is ready for analysis and identifying areas to improve process - such as ensuring important customer fields for analysis are populated, rather than spending cycles building integrations from scratch.

Further, because Einstein Analytics enables analytics to be quickly deployed to front-line workers, it accelerates the feedback loop to identify gaps in data or opportunities to refine metrics for analysis.



## Key Takeaways for Success

1. Have a good understanding of the data and build on key company metrics.
2. Standardize on overall, functional, and operational customer measures.
3. Ensure lateral alignment across sales, marketing, finance, and service functions.
4. Get your analytics team embedded within the line-of-business functions.
5. Provide training and adoption and get users hands-on to break down barriers.
6. Measure customer analytics adoption by monitoring user activity.
7. Don't underestimate self-service and query speed as important adoption drivers.
8. Use prebuilt integration to accelerate customer analytics projects.
9. Using embedded customer analytics, and having the ability to act on insights, increases value.
10. Leveraging customer analytics paired with data science can aid in uncovering insights



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