salesforce einstein analytics

EINSTEIN ANALYTICS APPS
FOR EVERYONE

Here's why analytics apps are taking over every line of business.

# Smarter Customer Interactions and Business Decisions. Everywhere.

Truth be told, traditional analytics tools haven't fundamentally changed in years. Tools to create dashboards and reports have been around since the 90's, yet today, they're still designed for analysts, not for the way the front lines work.

It's the reason we created Einstein Analytics apps for everyone, available on AppExchange. They put relevant, powerful, contextual analytics in the hands of everyone who can make it count, when it counts – everywhere.

They're purpose-built and contextual. They're powered by rich data. They foster action. And of course they're mobile-first. They're the key to empowering every business user to be smarter about every customer interaction, every time.

60%	of business users are concerned about inconsistent spreadsheets.
61%	rely on others to build and generate reports.
50%	of actions are taken on incomplete data.
61%	of workers report working outside of the office.

How can everyone in every line of business be smarter about every customer interaction and business decision?
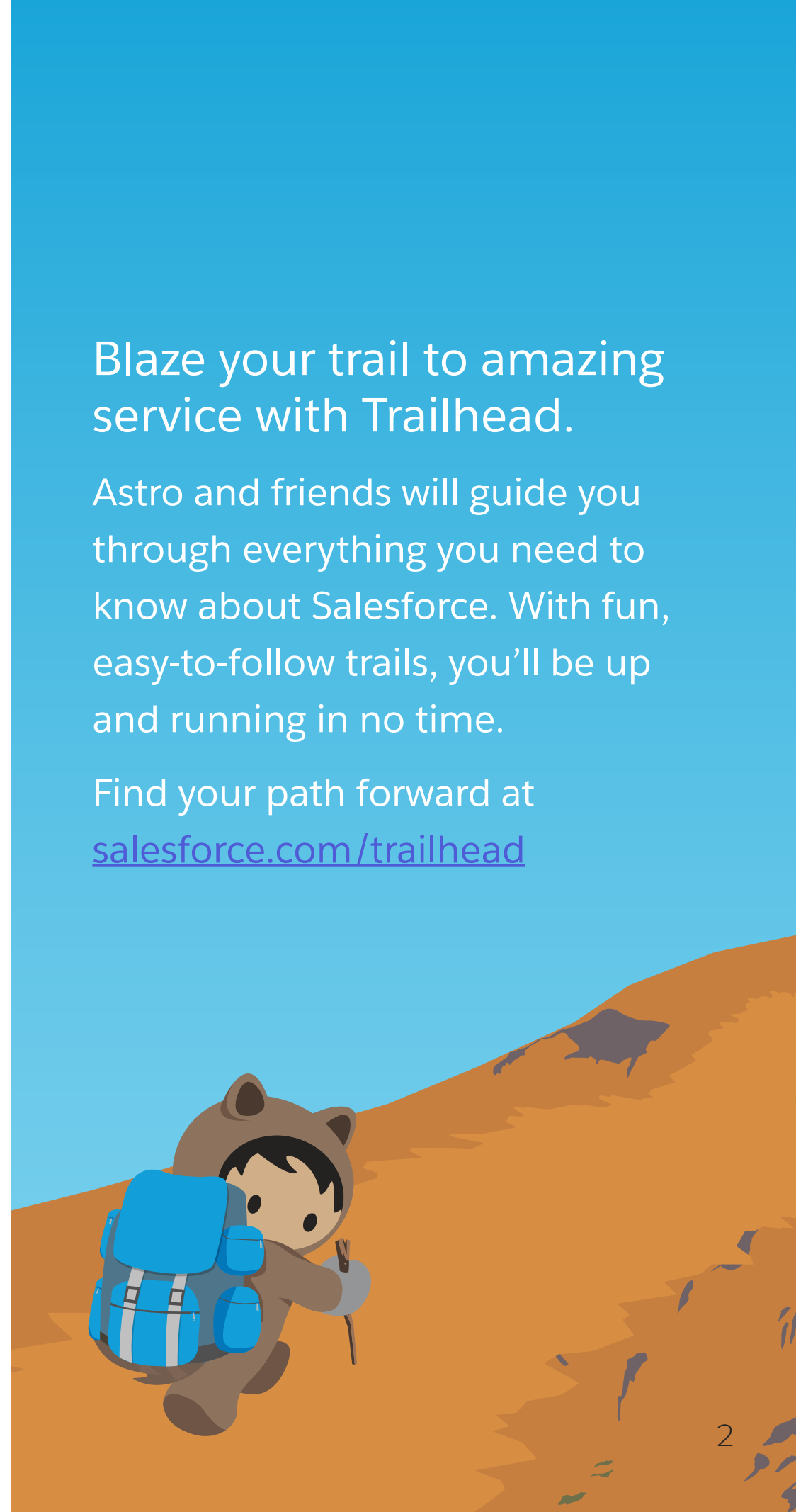
Blaze your trail to amazing service with Trailhead.

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

WHAT EXACTLY ARE
EINSTEIN ANALYTICS APPS?

SMARTER DECISIONS

Analytics apps are taking over. And for good reason. They're purpose-built, mobile, intuitive, and actionable. They empower the front lines to make smarter decisions at the point of interaction.

Unlike traditional analytics tools, analytics apps are ready to go. No construction required. For sales and marketing, they're prebuilt to increase effectiveness, upsell, productivity and conversion. Service teams can use them to improve field efficiency and highlight opportunities to enhance customer satisfaction, from call center to the customer site. Human resources can make better, more timely talent and recruiting decisions in tune with the business.

## A SMARTER WAY TO EMPOWER EVERYONE

Complete

Einstein Analytics apps start with a foundation of data that other analytics tools simply can't deliver. This includes native access to rich opportunity, customer service, and marketing data, blended with data from ISV Force.com apps, and other information across the enterprise and beyond.

Contextual

Putting apps in the hands of everyone means thinking differently about what it takes to engage everyone. Analytics embedded in Visualforce pages or communities, Einstein Analytics actions that encourage action on insight, and intuitive mobile-first design – all enhance adoption and engagement.

Everywhere

Bringing Einstein Analytics apps to everyone takes a community of experts. Salesforce and our ISV ecosystem partners have created a plethora of Einstein Analytics apps that encapsulate domain expertise in line-of-business and industry best practices. Powerful Einstein Analytics lenses, dashboards, actions, with ready-to-go relevant insights are built in.
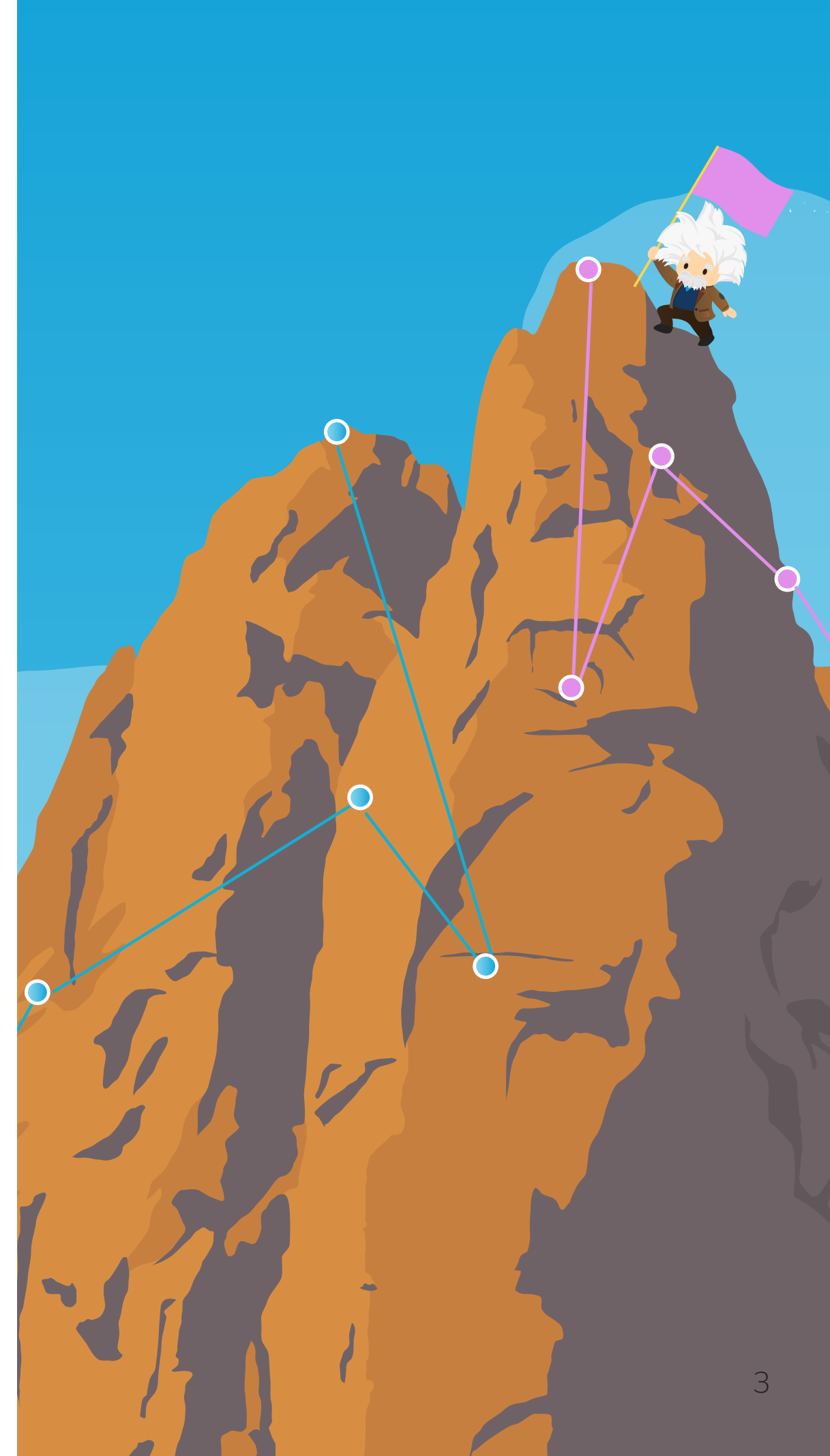
WHAT EINSTEIN ANALYTICS APPS MEAN FOR EVERY LINE OF BUSINESS

Enabling your front line to make smarter, contextual decisions is more within reach than ever before. Using Einstein Analytics apps, every customer and employee touchpoint from Sales, to IT, to HR, and to even emerging new departments like sustainability can make better decisions when and where it counts.

Learn how these Einstein Analytics apps, available on the AppExchange, can enhance your team or department.

Leads

Sales

Renewal

Upsell

Satisfaction

Influence

Line-of-Business Application
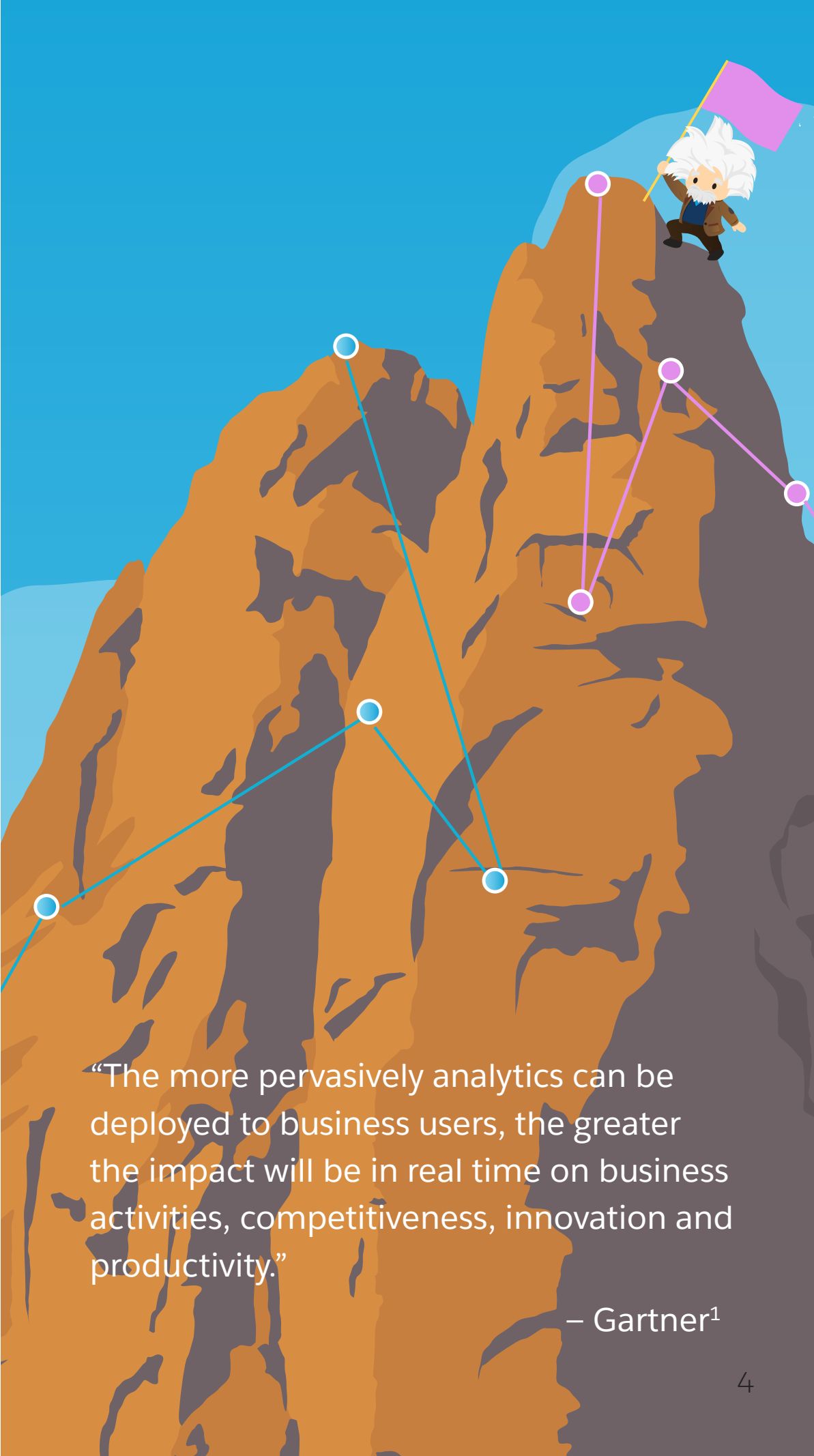
"The more pervasively analytics can be deployed to business users, the greater the impact will be in real time on business activities, competitiveness, innovation and productivity."

– Gartner[1]

Einstein Analytics Apps for Marketing

Marketing has always led the way with analytics on digital initiatives, starting with measuring the performance of the very first banner ad, back in 1994. Smarter, more effective analytics empowers marketers to identify which digital and online programs they should double-down or scale back, optimizing marketing's contribution to the bottom line and helping to identify the most impactful programs.

Finally, marketers can work more collaboratively with the sales teams to identify performance gaps and continually working towards the most the most fruitful, high-performing leads.

Better yet, marketers gain insight into marketing messages and signals that resonate in order to continually improve customer engagement.

> "Taking an integrated approach to analytics can free up 15 to 20 percent of marketing spending."
>
> – Gartner[2]

SALESFORCE B2B MARKETING ANALYTICS

Pardot B2B marketing automation for marketers delivers a central canvas to power smarter marketing programs. Pardot provides a full suite of tools that help marketers create meaningful connections, generate more pipeline, and empower sales to close more deals.

B2B Marketing Analytics from Pardot turns data into actionable insights to maximize marketing efforts. No need for data specialists – it's a powerfully simple way to dive deep into the data, create different lenses to truly understand how campaigns are performing, continually improve them, and collaborate with sales.

B2B MARKETING ANALYTICS

- Pipeline analytics
- Engagement
- Email CTR
- Campaign ROI
- Campaign cost
- Email performance

- Email engagement
- Conversion rates
- Clicks
- Open rates
- Submission rates
- Opt-outs
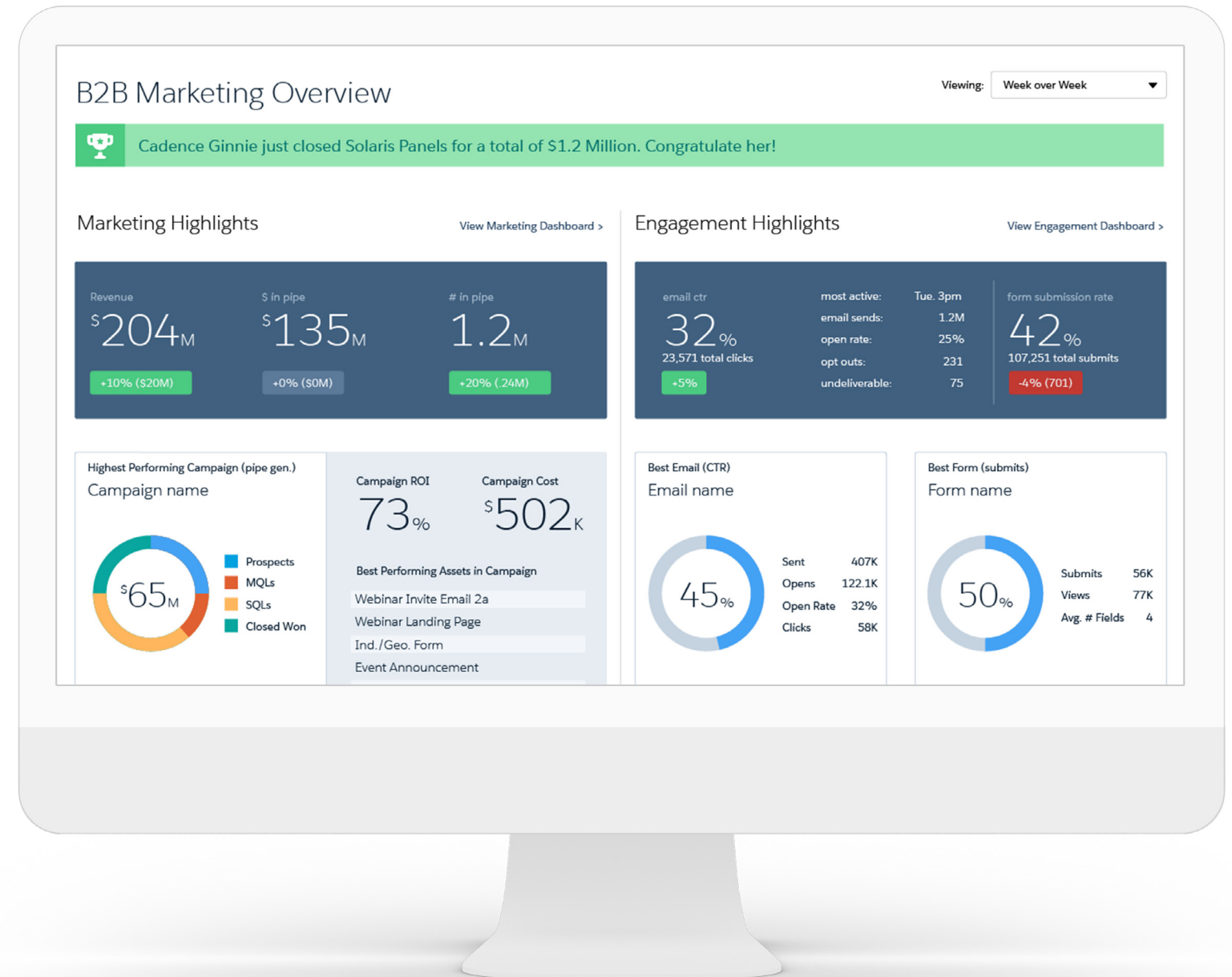
IDIO MARKETING INTELLIGENCE EINSTEIN ANALYTICS APP

We all consume vast amounts of content as we research a purchase or investment. Content analytics provides valuable insights for marketers, revealing a predictive and granular understanding of each customer's intent, enabling marketers to craft a better digital experience and more personalized customer journey – while providing insight into content effectiveness, audience engagement, and segmentation.

Idio's Marketing Intelligence Einstein Analytics app delivers predictive, actionable insight into content and editorial performance. Cross-channel behavior analytics sheds light on real-time customer interests across web, email, mobile, and social channels. Topic performance provides rich insight into the most engaging topics. Conversion analysis helps marketers discover what content drives conversion on the customer journey.
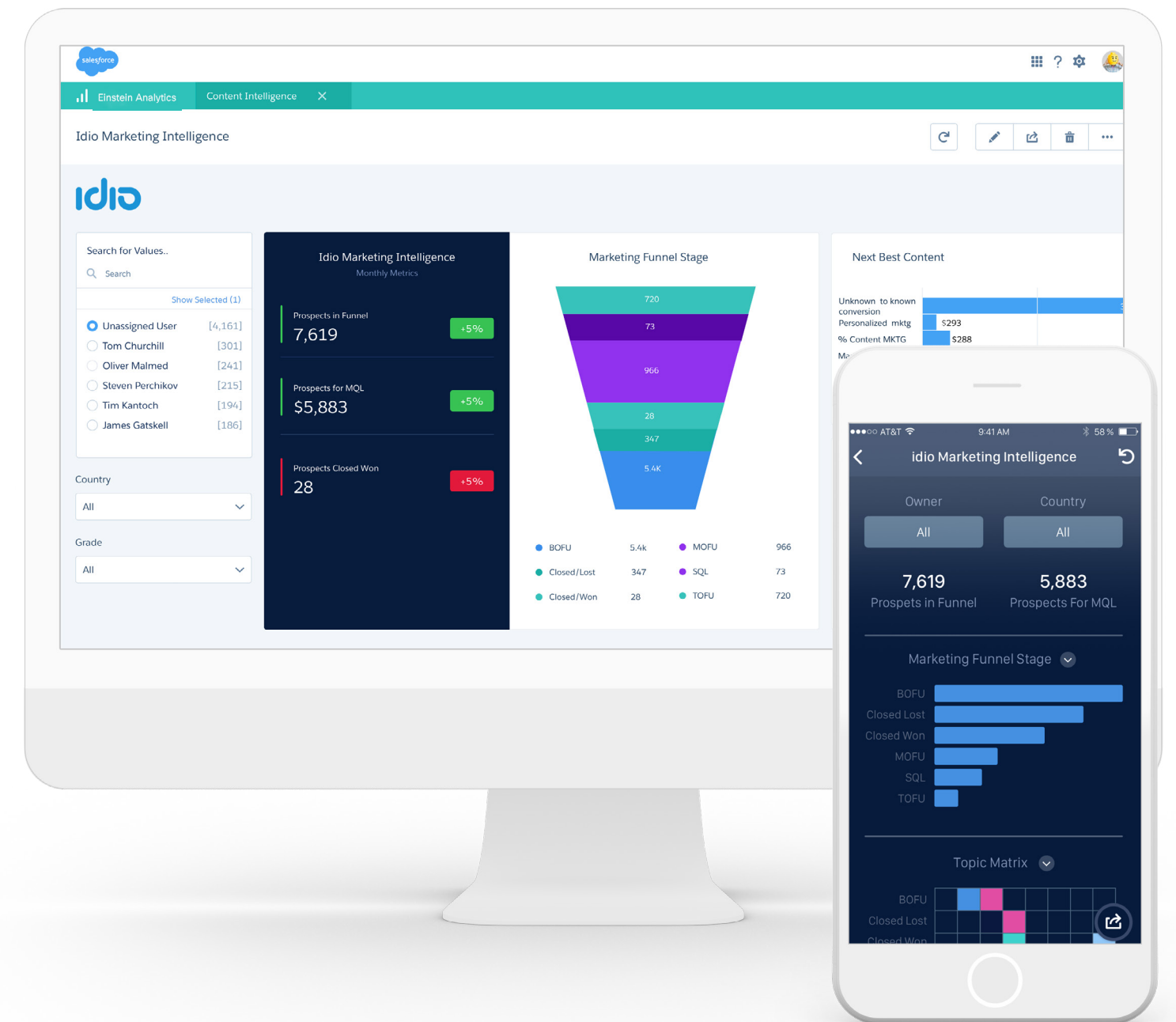
EINSTEIN ANALYTICS APP FOR CONTENT ANALYTICS

- Customer interests
- Real-time segmentation
- Content performance
- Funnel analysis
- Topic performance
- Customer journeys
- Interest areas
- Content gaps

Einstein Analytics Apps for Sales

Prospects are looking for sales teams to be trusted advisors, with a more intimate knowledge of products, needs, and value. Yet sales teams are often distracted, and lack the insight to spend time nurturing the right relationships.

Analytics frees up and focuses valuable sales team resources to spend the right amount of time with the right prospects – while creating transparency sales managers need to elevate sales performance.

SMARTER, MORE EFFECTIVE SALES.

Sales analytics enables sales operations, managers and executives to collaborate, align, and optimize their effectiveness and success – while spending less time on spreadsheets. The entire team benefits with clearer forecast visibility and reviews, improved opportunity analytics, greater focus on targeting and upsell, and more predictive insight to reduce risk. The result: more time selling and building powerful customer relationships.

> "More than one-third of businesses expect revenue increases when applying analytics best practices to sales."
>
> – Oxford Economics[3]

SALESFORCE SALES ANALYTICS

Turn Sales Cloud data into smarter decisions with Salesforce Sales Analytics. Sales Analytics powers weekly pipeline calls, quarterly business reviews, and performance metrics. Dashboards prepopulated with Sales Cloud data bring best-practice dashboards and KPIs to the entire sales team.

Sales managers can track year-over-year business performance and get a better view of the big picture by reviewing pipeline movement, risk indicators, and forecast metrics to identify behaviors that drive sales. Sales reps get streamlined forecast review calls, pipeline analytics, top deals to focus on, and increased visibility into winning lead sources.

EINSTEIN ANALYTICS APP FOR SALES

- Pipeline trending
- Forecast review
- Sales productivity
- Customer trends
- Geographies
- Product analysis

- Source analysis
- Leaderboard
- Player stats
- Account summary
- Business review
- Knowledge management

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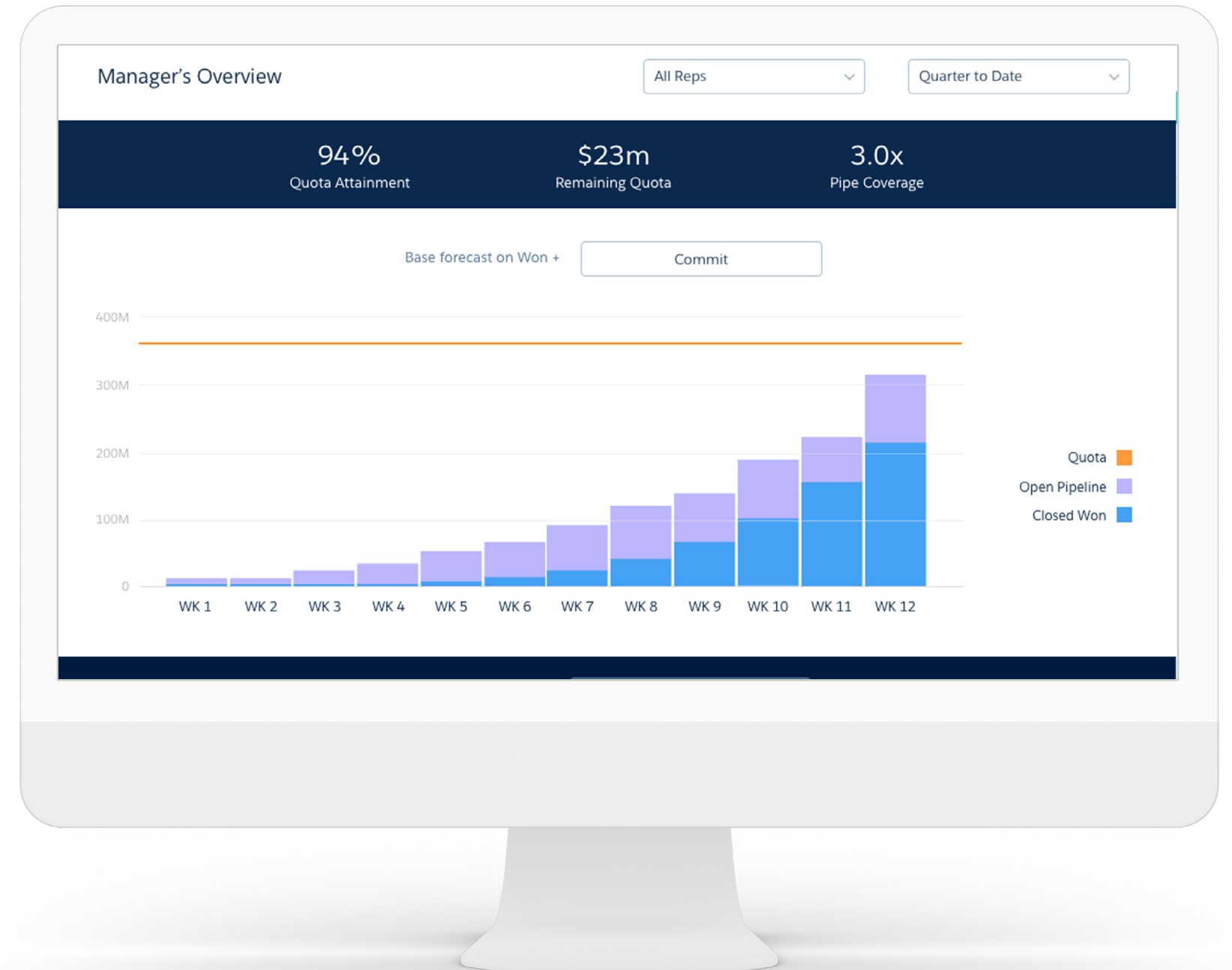
HILO STUDIOS SALES NAVIGATOR EINSTEIN ANALYTICS APP

Maximizing customer value means gaining end-to-end revenue transparency – from opportunity to cash, integrating customer data that's often locked away in back-office systems. Sales leaders can identify white space opportunity to grow the value of existing accounts, while improving customer profitability.

Hilo Studios Sales Navigator Einstein Analytics app gives sales, operations, and finance leaders visibility into actuals, bookings, and revenue from their ERP system that's linked to Salesforce. With increased customer revenue insight, business leaders get a clear perspective into the funnel. Opportunity analytics directs sales managers to the most fruitful demographics and white space in customer accounts.

### EINSTEIN ANALYTICS APP FOR REVENUE AND WHITE SPACE ANALYTICS

- Revenue
- Bookings
- Sold analysis
- White space analysis
- Gross margin and units sold
- Industry analysis
- Opportunity trends
- Revenue segmentation
- Opportunity probability
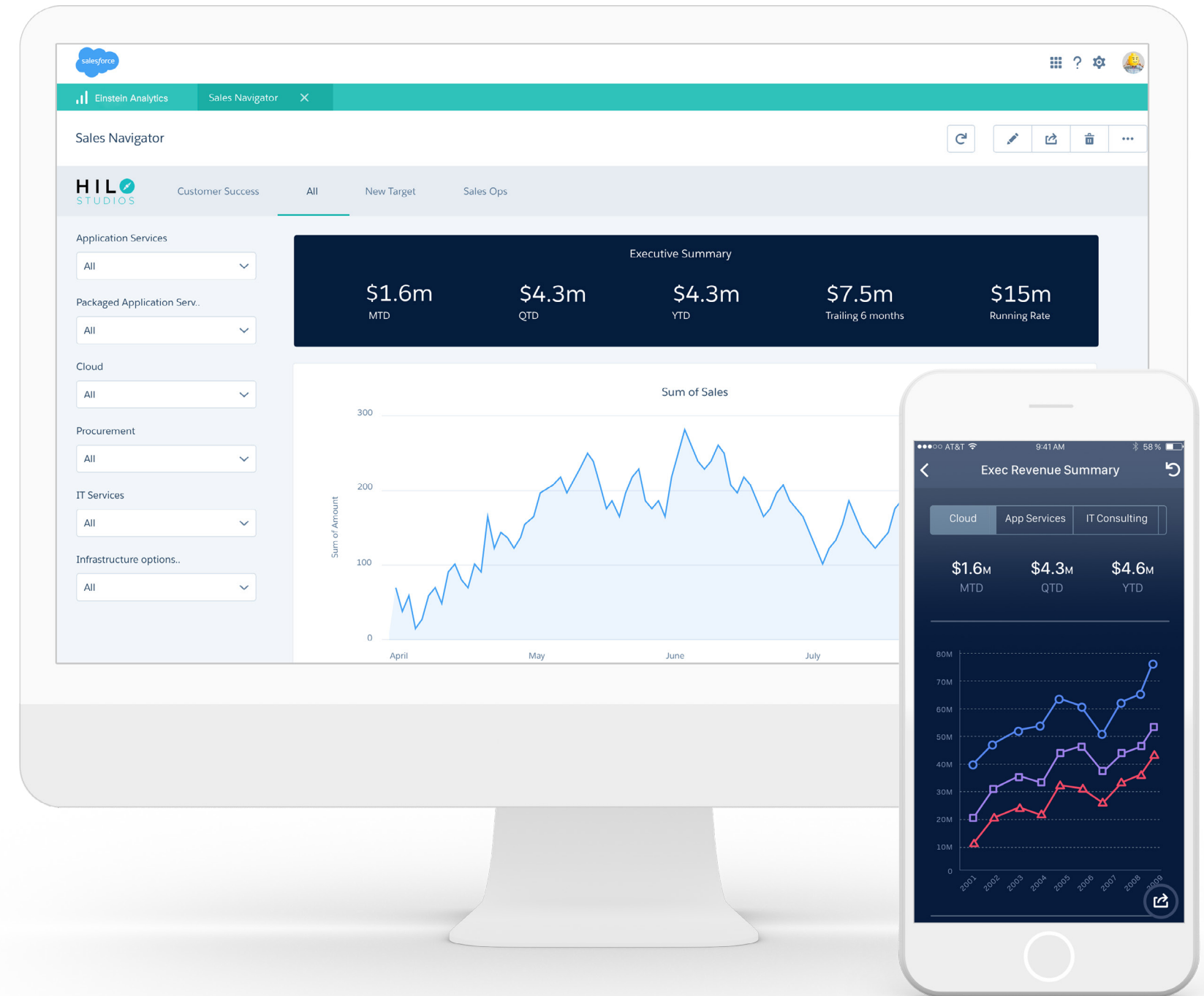
CLOUD CONVERSION EINSTEIN ANALYTICS APP

For online retailers data and analytics are competitive advantages. Analytics empowers e-commerce companies to make smart decisions, increase sales, and improve back-office performance and service.

Cloud Conversion, an e-commerce ERP provider running on Force.com, provides operational analytics for retailers with its new Einstein Analytics app. Online retailers and brands can instantly see customer trends, orders, inventory analytics, supplier visibility, and purchasing, and shipping insights – driving operational efficiency and increased profitability.
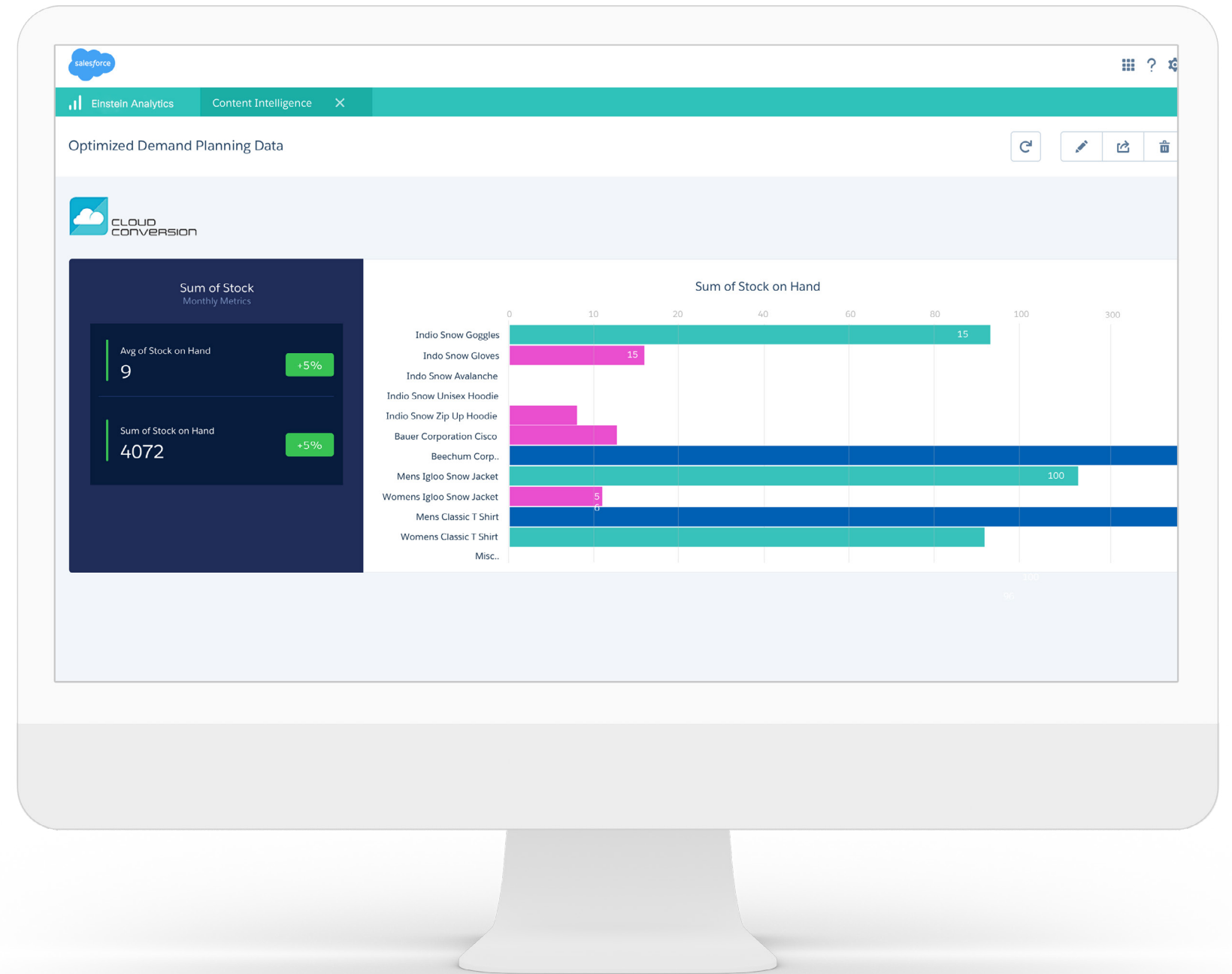
EINSTEIN ANALYTICS APP FOR E-COMMERCE

- Orders
- Returns
- Marketplaces
- Inventory
- Suppliers
- Products

- Purchase orders
- Customers
- Product issues
- Shipping
- Pricing performance
- Forecasting and planning

Einstein Analytics Apps for Service

Great service is the key to creating brand loyalty. New service channels create opportunities to balance and optimize interactions. Social media enables the immediate amplification of customer sentiment, requiring relentless focus on analyzing and taking action to improve service.

THE CUSTOMER EXPERIENCE GAP

Without strategy and automation, service analytics can be hard. Salesforce found that 53% of organizations struggle to simply get data out of their systems of engagement, and 52% still rely on spreadsheets to analyze contact center trends and insight.

SMART, DATA-DRIVEN CUSTOMER SERVICE

The secret to equipping service managers with insight that moves the dial isn't just metrics and visualizations – it's choosing the right metrics, delivered at the right time, and taking action on them. Service analytics equips service centers to elevate customer success.

> 49% of companies who effectively use customer analytics are likely to have a profit well above their competitors.
>
> – McKinsey[4]

SALESFORCE SERVICE ANALYTICS

A ready-to-go analytics app for Service Cloud customers, Salesforce Service Analytics enables every service manager or agent to quickly gain customer visibility, track call center performance, and see satisfaction trends that drive business and improve customer service.

Service Analytics delivers dynamic service dashboards to every rep, on any device. For service managers, it delivers a new level of insight so they can see case trends, agent efficiency, and service-channel performance.

Whether you've discovered a new service trend or a custom insight, Service Analytics actions make it simple to quickly create a task, log a ticket, change a close date, or share insights on any device.
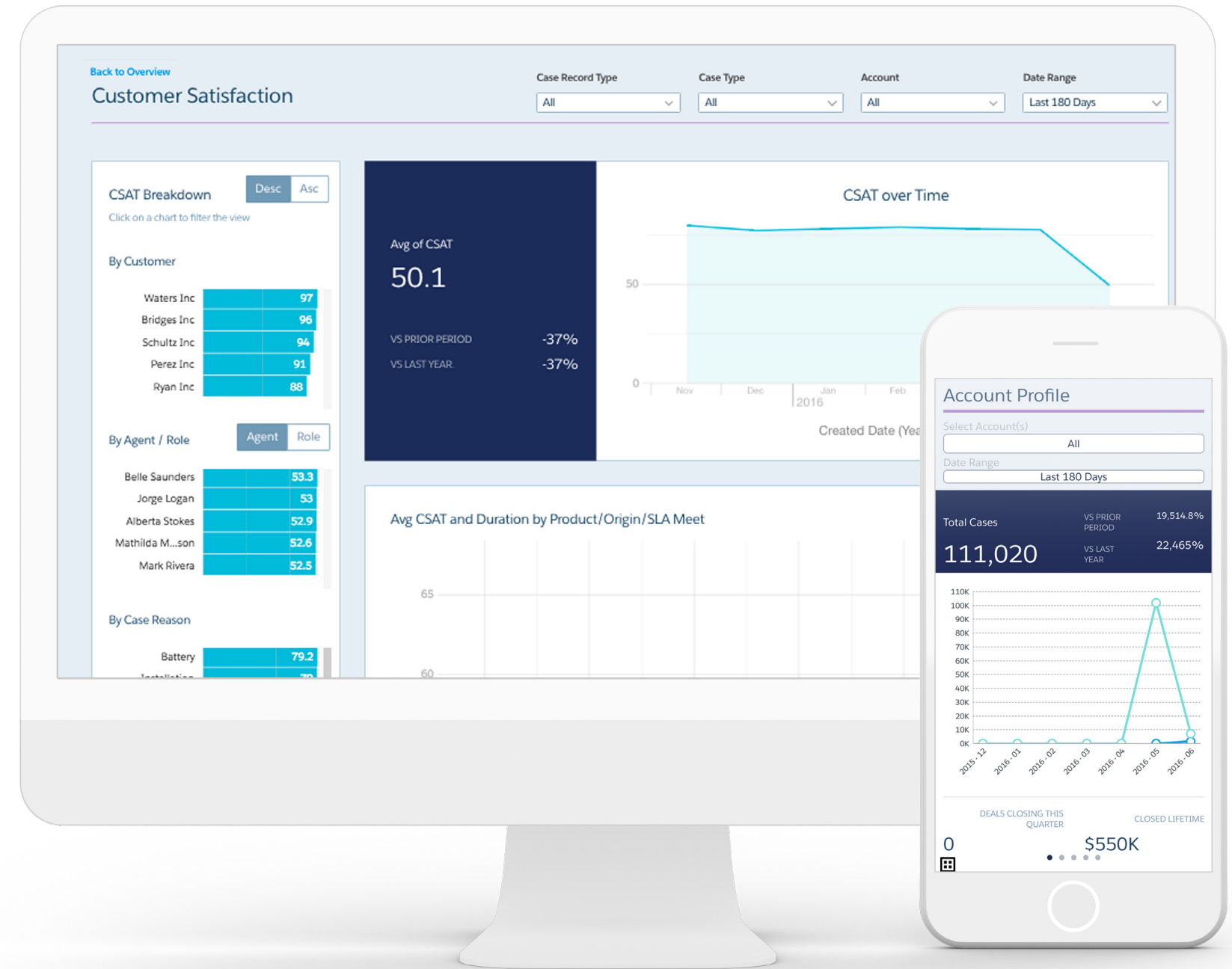
SALESFORCE SERVICE ANALYTICS

- Agent performance
- CSAT trends
- Cases types
- Escalations
- Channel analytics
- Case duration

- FCR
- SLAS
- Calls per day
- Backlog
- Case volumes
- Knowledge management

MAVENLINK EINSTEIN ANALYTICS APP FOR PROFESSIONAL SERVICES

Keeping close tabs on project performance – including delivery, costs, and staffing, reduces risk and boosts client success. Professional services analytics delivers visibility into how projects are progressing and flags issues. It's the key to making on-the-fly adjustments, keeping projects on track, and most importantly, maximizing client satisfaction.

Mavenlink's Einstein Analytics app for professional services improves the visibility, predictability, and profitability of client engagements. Services leaders are better able to plan for demand, while sales teams can keep tabs on client project progress. Real-time project analytics enables managers to gain control over project margins, improve resource utilization, enable more accurate forecasting of revenue and costs, streamline handoffs, identify project issues, and more accurately time salesperson re-engagement.
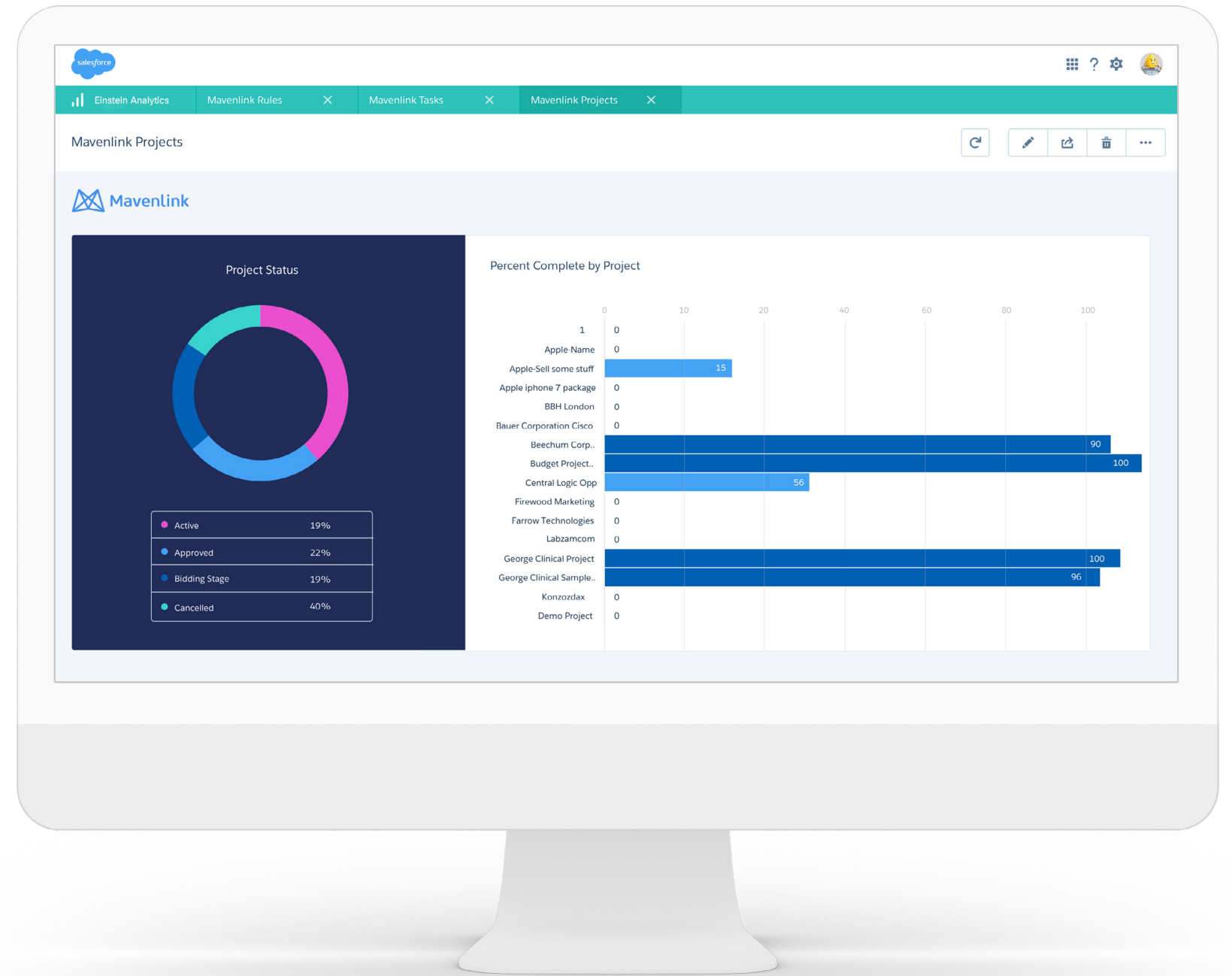
EINSTEIN ANALYTICS APP FOR PROFESSIONAL SERVICES

- Project dashboard
- Issues and opportunities
- Financial insights
- Project status
- Project pipeline
- Task status
- Resource utilization

FINANCIALFORCE EINSTEIN ANALYTICS APP FOR PROFESSIONAL SERVICES AUTOMATION

FinancialForce's Einstein Analytics app for professional services automation (PSA) delivers dashboards that provide information 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 from a single project to the entire portfolio make it easier than ever to get business insight, take smarter actions, and improve overall predictability.

EINSTEIN ANALYTICS APP FOR PROFESSIONAL SERVICES

- Bill rates
- Time card analysis
- Billings by employee
- Available backlog
- Project realization
- On-hold backlog/type
- Billings forecast

- Project and account forecast
- Revenue treatments
- Milestone analysis
- Actuals makeup
- Backlog visibility
- Business optics
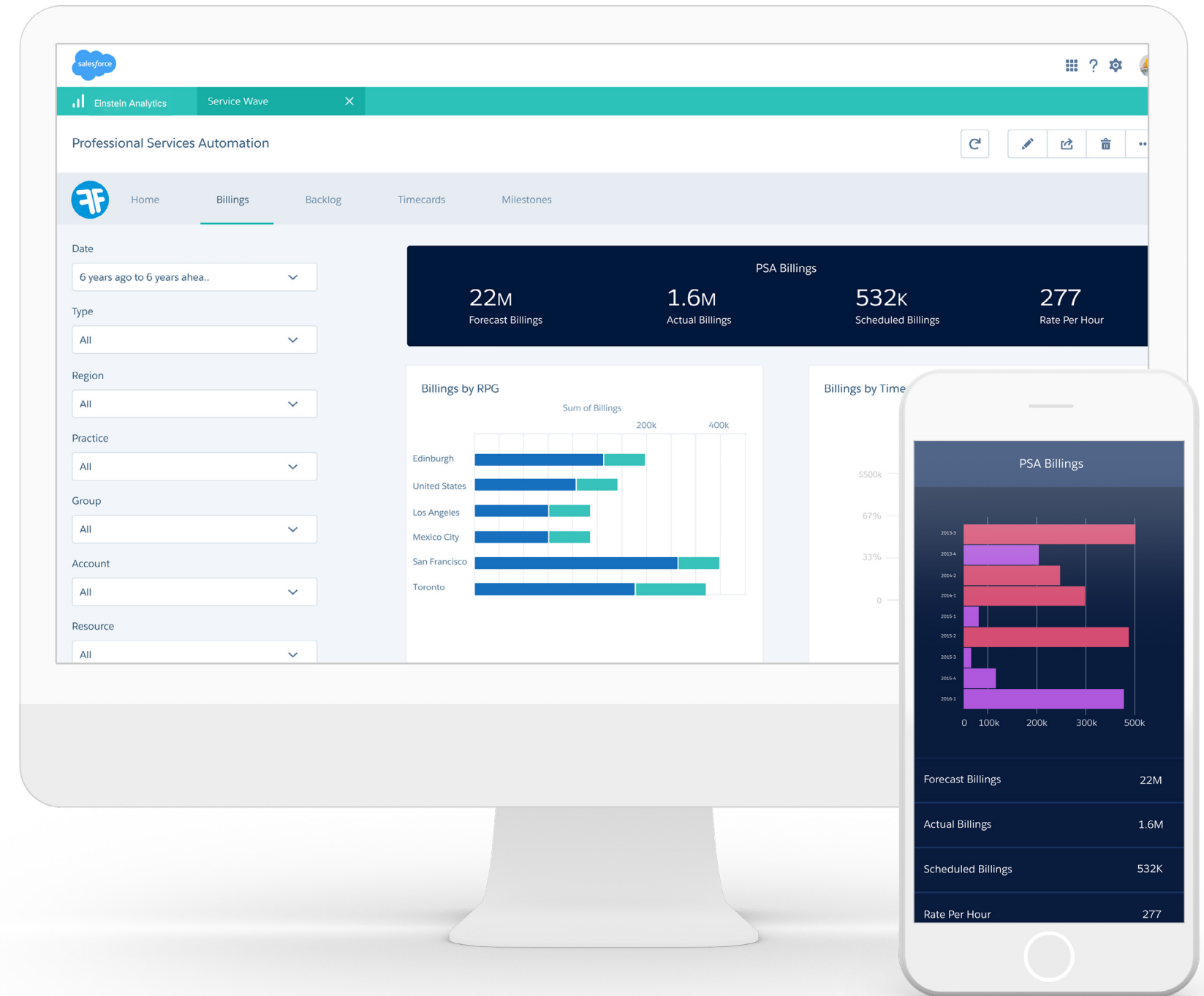
Event Monitoring Apps for IT

Machine-generated data is one of the fastest-growing opportunities within analytics. It's the foundation for improving customer experience, providing the de facto record of all user and customer behavior, application performance, and more. Measuring and monitoring IT performance isn't just good for the bottom line – it's essential for customer experience.

THE BUILDING BLOCKS FOR CUSTOMER SUCCESS

Smarter IT analytics provides an early warning system so IT managers can keep projects on time and under budget – and spot problems early on before they turn into a crisis. Event monitoring analytics empowers managers to proactively address application and infrastructure issues that could put productivity and customer satisfaction at risk.
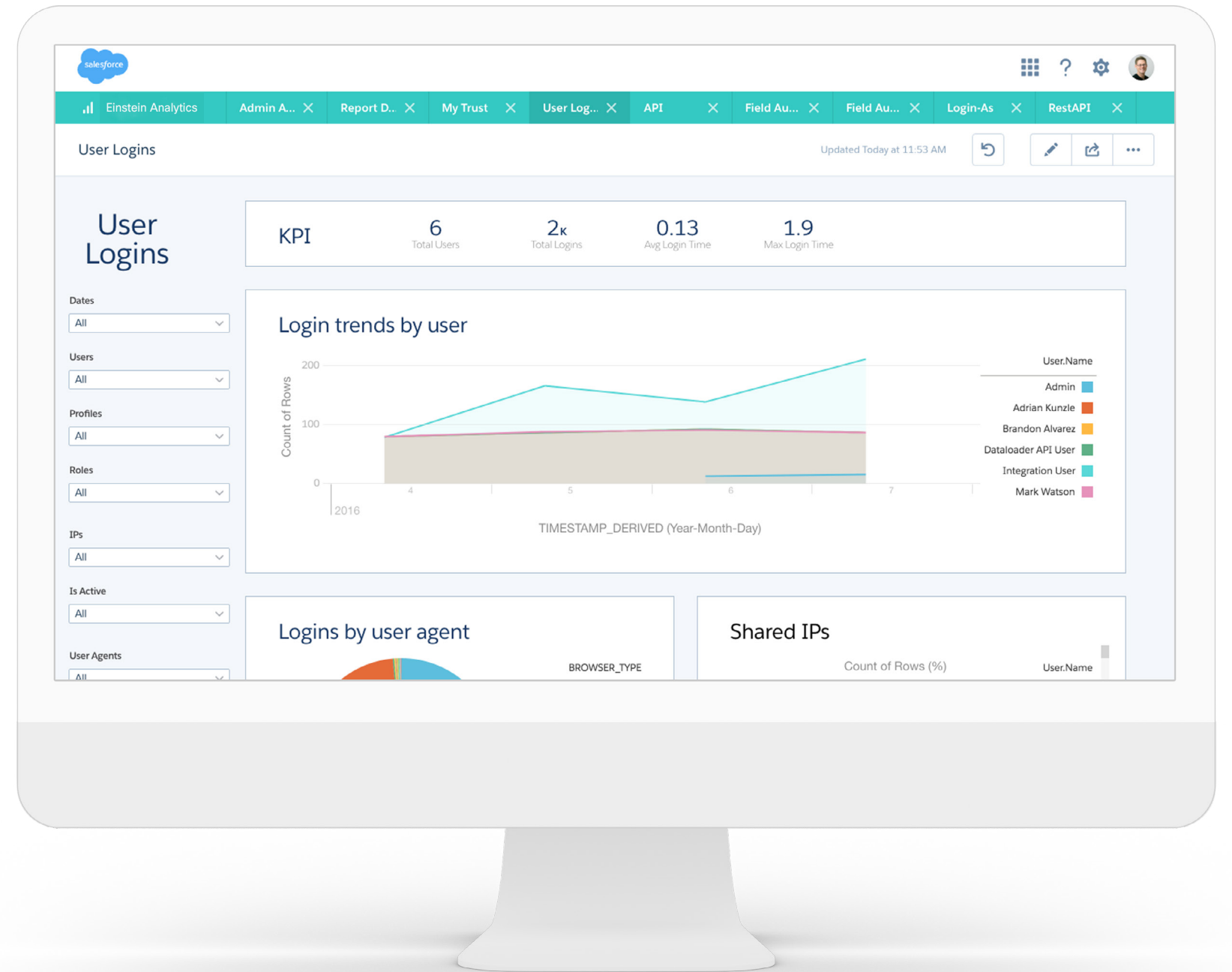
SALESFORCE EVENT MONITORING ANALYTICS

Salesforce Event Monitoring Analytics delivers deeper understanding of the health of Salesforce applications, so IT or business owners can provide better support and identify performance issues that impact user experience.

Unlock Data and Monitor Activity

With 15 prebuilt dashboards and custom views into more than 29 types of events, Event Monitoring Analytics helps admins and leaders proactively manage business users and refine the overall customer experience.

Event Monitoring Analytics helps track the usage of features like Lightning UI or the Salesforce1 Mobile App to ensure adoption and increase line of business engagement. It's even easy to quickly understand the information employees are accessing – making it easier to ensure the security of sensitive data.

SALESFORCE EVENT MONITORING ANALYTICS

- Login trends
- Usage
- Users
- Login times
- Page hits

- Detailed log data
- Downloads
- Export trends
- Page hits
- Visualforce performance
- Shared IPs

CLOUDAWARE EINSTEIN ANALYTICS APP FOR IT

Your third-party cloud infrastructure, whether AWS, Azure, or Google, is vital for customer experience, from website performance to ensuring performant in-house applications. Infrastructure analytics provides visibility into exceptions and SLA compliance, spend on usage-based services, and provides smarter visibility to ensure customer-facing apps are always running smoothly.

The CloudAware Einstein Analytics app for IT provides CIOs and IT leaders with insight on their usage on cloud platforms such as AWS, Azure, and Google so they can analyze cloud infrastructure operations, cost management, governance, compliance, and security – reducing IT costs, and helping prioritize IT management initiatives.

EINSTEIN ANALYTICS APP FOR IT

- Cloud spend by project
- Cloud waste
- Idling resources
- Spending trends
- Downloads

- Insecure cloud configurations
- Vulnerability resolution rates
- Missing patch compliance levels
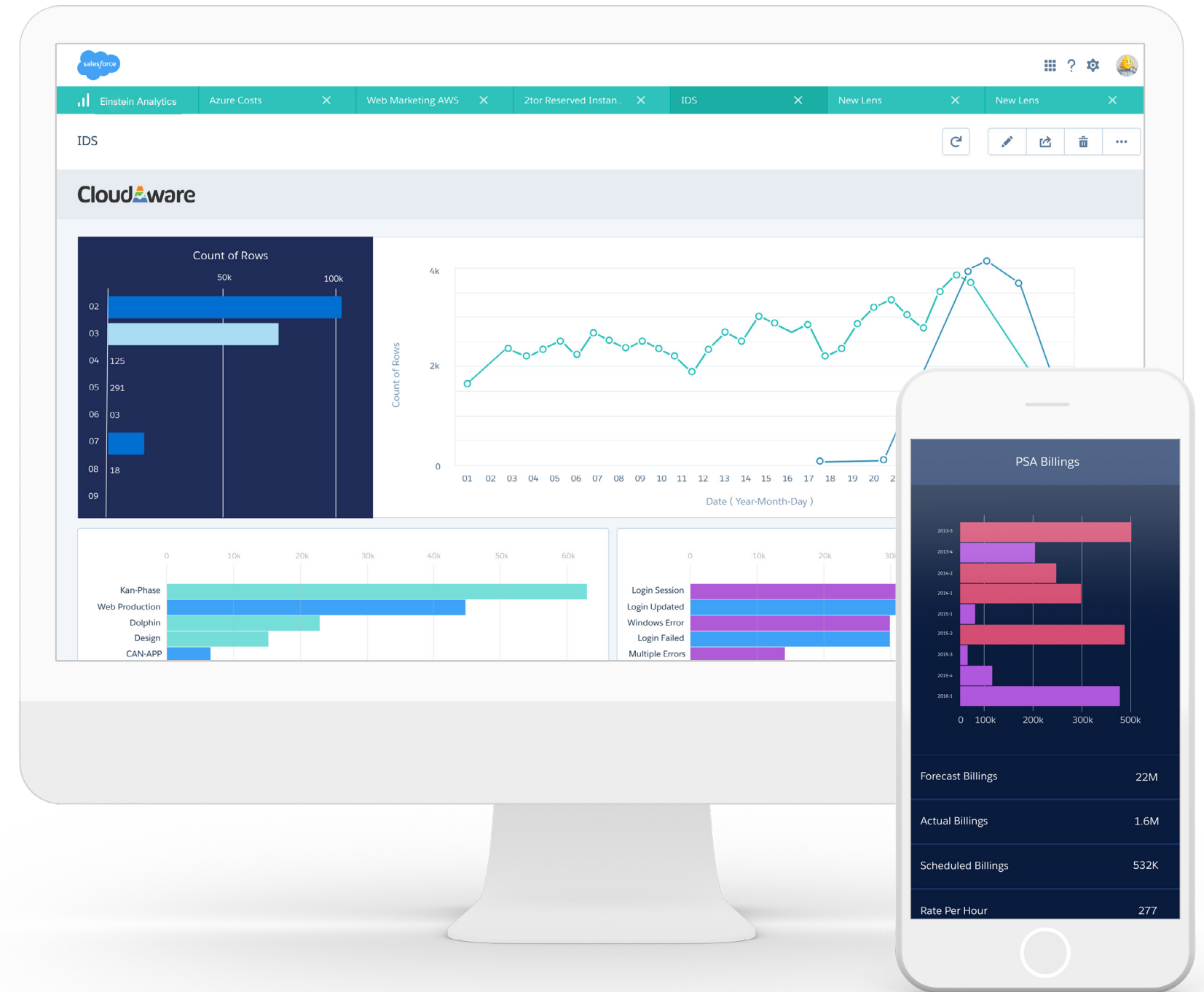
CLOUD COACH EINSTEIN ANALYTICS APP FOR PROJECT AND PORTFOLIO MANAGEMENT

Because of increasing transparency and budget constraints, it's never been more important for every project to map back to business and ultimately customer value – and correct course rapidly. Project and portfolio management (PPM) analytics helps organizations ensure that projects deliver on time, on budget, and meet or exceed customer expectations.

The Cloud Coach Einstein Analytics app for project and portfolio management provides visibility into individual project or resource performance, or across the entire portfolio. Dashboards provide IT leaders with instant visibility into trouble spots like project overruns, resourcing issues, or bottlenecked tasks.

EINSTEIN ANALYTICS APP FOR PPM

- Prioritize demand
- Investment scoring
- Resource capacity and planning
- Late-starting tasks
- Late-running tasks

- Project performance
- Project progression
- Portfolio performance
- Project management
- Upcoming demand
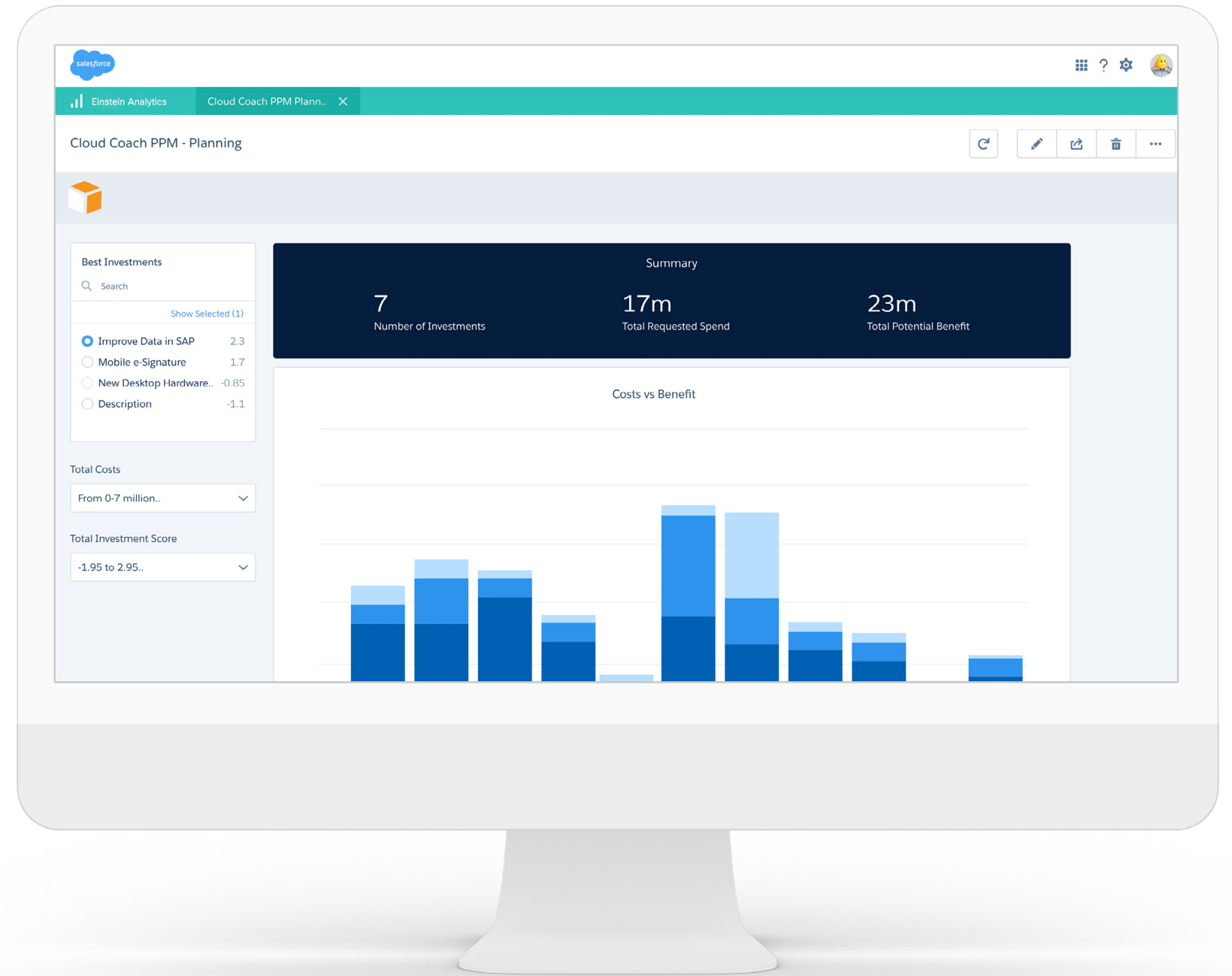
Einstein Analytics App for HR and Recruitment

The war for talent means HR and recruitment managers must treat candidates and hiring managers like customers. They must provide the right candidates at the right time, while staying on track with ever-changing business demands. Analytics helps hiring managers make smarter decisions about potential candidates.

Lumesse provides expertise in recruitment technology, talent aquisition, and HR, and is comprised of experts in HR and L&D management. With Lumesse TalentObjects and Einstein Analytics, HR and recruiting managers can identify staffing bottlenecks, get real-time recruiting metrics, and understand the ROI on recruiting channels – in context, from anywhere.
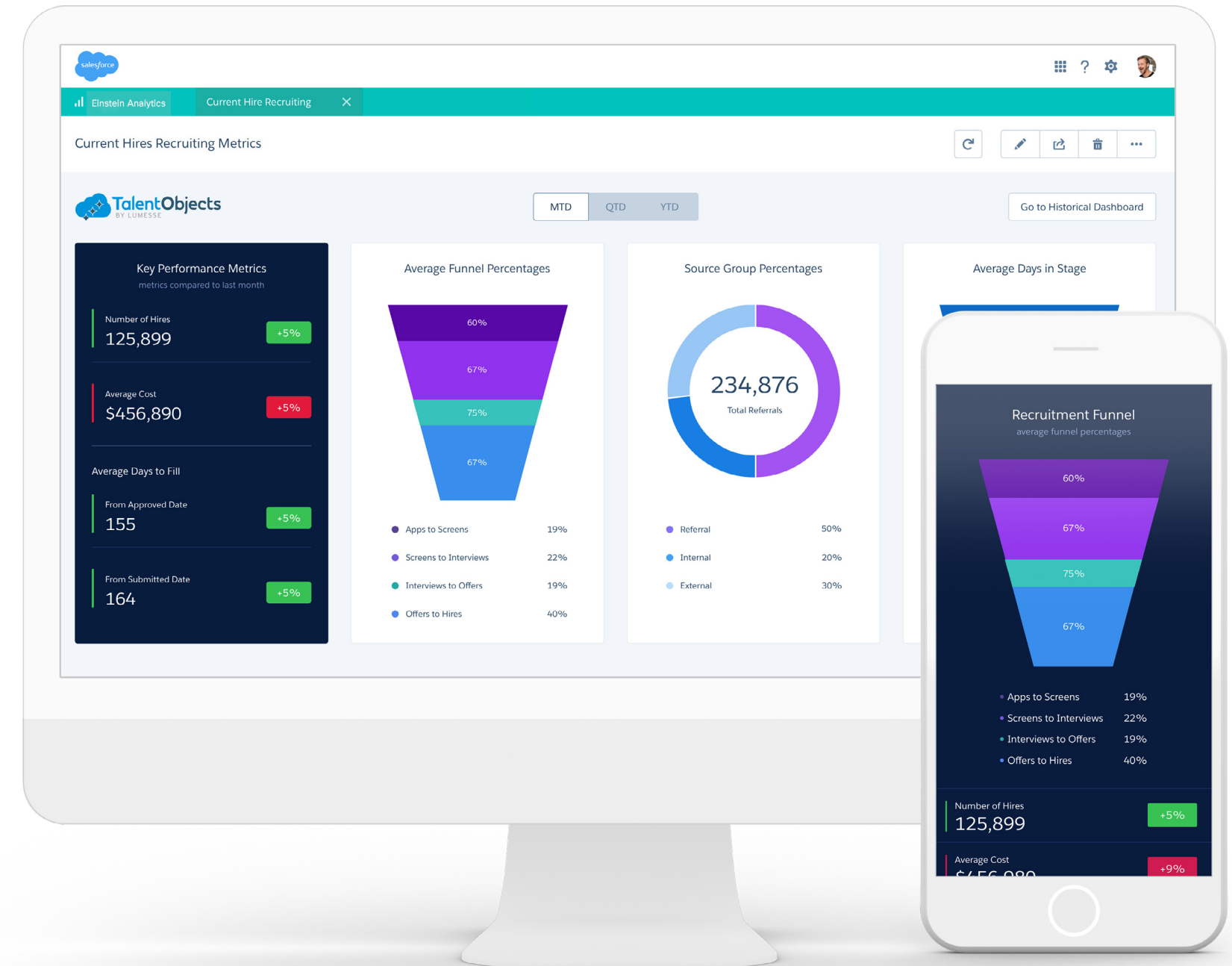
EINSTEIN ANALYTICS APP FOR HR AND RECRUITMENT

- Apps to screens
- Screens to interviews
- Interviews to offers
- Offers to hires
- Funnel trends
- Number of hires
- Cost per hire

- Days to fill
- Cost per source
- Days in stage
- Average pay
- Interviews/hire
- Offer/hire %
- Hiring by location


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Einstein Analytics App for Sustainability

Brand image and loyalty extend beyond just product and services: they require a transparent commitment to corporate sustainability. Sustainability analytics collects and analyzes data across energy consumption, and greenhouse gas (GHG) emissions for deep insights that reinforce sustainability initiatives and guide resource efficiency.

CloudApps Einstein Analytics app for sustainability helps teams meet ever-increasing environmental reporting demands, track key sustainability metrics, reduce operational cost, and mitigate compliance risk.

EINSTEIN ANALYTICS APP FOR SUSTAINABILITY

- Actuals VS projections
- Total GHG emissions
- Emissions by division
- Emissions by geography
- Emissions by type
- Travel GHG by type
- GHG fuel and electricity
- Waste recycled
- Waste to landfill
- Water supply usage
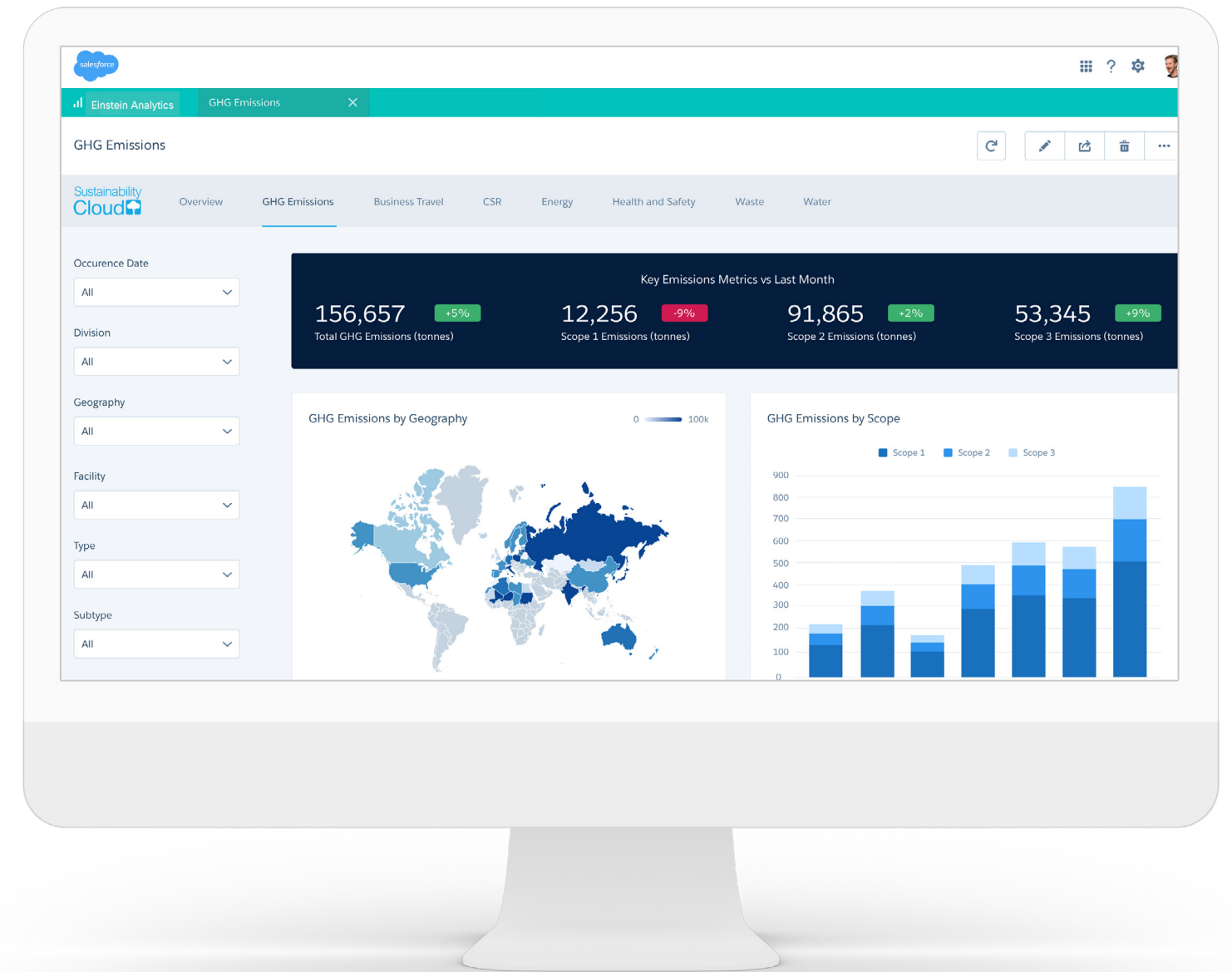
EINSTEIN ANALYTICS APPS
for Everyone

Now everyone in every industry can be smarter about their customers. Contextual, actionable, and mobile-first apps are here. They're more relevant. More engaging. More insightful. Fueled by technology and expertise, Einstein Analytics apps provide solutions for every team in every industry. Smarter business decisions have never been more in reach.

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Resources

[1] "Gartner Says Actionable Analytics Will Be Driven by Mobile, Social and Big Data Forces in 2013 and Beyond," February 11, 2013 http://www.gartner.com/newsroom/id/2332515.

[2] Bhandari, Rishi, Marc Singer, and Hiek van der Scheer, "Using marketing analytics to drive superior growth," McKinsey & Company, June 2014, http://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/using-marketing-analytics-to-drive-superior-growth.

[3] Roehrig, Paul and Pring, Ben "The Value of Signal (and the Cost of Noise) The New Economics of Meaning-Making," Oxford Economics & Cognizant, 2013 https://www.cognizant.com/InsightsWhitepapers/The-Value-of-Signal-and-the-Cost-of-Noise-The-New-Economics-of-Meaning-Making.pdf

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