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

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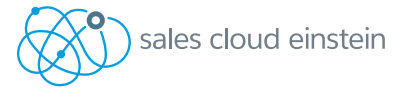
There isn't a sales rep in the world who would willingly choose to miss an important piece of information, allow a customer request to go unanswered, or leave money on the table. But in today's world of information overload, it's difficult to keep pace with the tornado of information that swirls around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

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

Einstein Opportunity Insights uses your Sales Cloud data from historical sales cycles and engagement with customers (e.g., 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.

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 reps will increase their quality selling time.

> "Opportunity Insights identified which deals were at risk and was right more than 90% of the time. We focused on those deals and hit our targets."
>
> Kai Yu Hsiung
> Chief Revenue Officer, Silverline

Einstein Opportunity Insights and Its Models

Each Einstein Opportunity Insight 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. As with Einstein Lead Scoring, 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 events and changes in accounts that are important to users. Einstein Account Insights monitors US-based news sources to surface merger and acquisition activity, plus signs of company expansion.

Privacy

Einstein Opportunity Insights captures and analyzes external communications only. It will not capture and analyze emails with the company's domain email address. Additionally, emails from specific addresses can be blacklisted from capture and analysis.

Top Benefits

- **Increase win rates**

- **Improve forecast accuracy**

- **Accelerate sales cycles**

- **Drive sales productivity**

Top Features

- **Zero Setup** – No implementation or import/export to separate tools

- **Predictions, Key Moments, and Smart Follow-ups** – Identify at-risk opportunities and reasons why

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

- **Recommended Next Steps** – Take action with one click
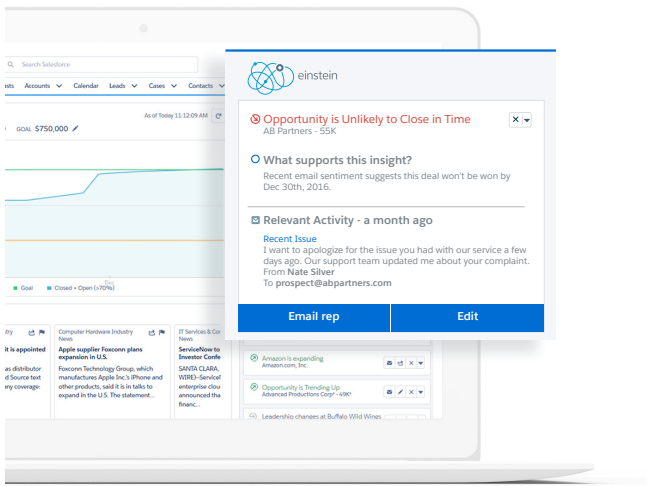
Einstein Opportunity Insights identifies opportunities that are unlikely to close in time and provides context as to why.
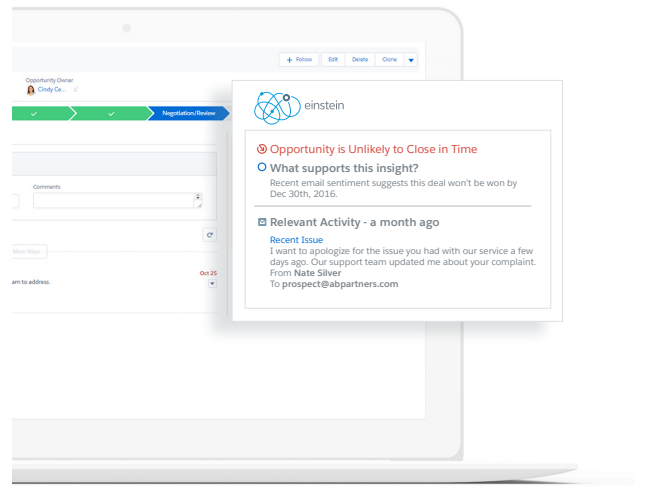
Einstein Opportunity Insights are also displayed in the Lightning Assistant on Opportunity detail pages.

Technical Specifications	
Email Integration	
Email integration required	✓
Gmail integration	✓
Office 365 integration	✓
Other email platform integration	✗
Model Development	
Automatic model development & adaptation	✓
Model configuration/manipulation	✗
Opportunity Insight Views by Role	
Sales representative	Opportunity Insights on user Opportunity records
Manager	Aggregate of teams' Opportunity Insights
Privacy Control	
Ability to ignore company domain emails	✓
Email address blacklisting	✓
Opportunity Insights Delivered	
Prediction Types	Winning unlikely, trending down, trending up, high effort
Smart Follow-Ups	No communication, prospect unresponsive
Key Moments	Competitor mentioned, negative sentiment, contact leaving, prospect re-engaged
Opportunity Insights by Page	
Lightning Home Page	✓
Opportunity Records	✓
Opportunity List Views	✓
Account Insights Delivered	
Key Business Developments	M&A activity, company expanding

Sales Cloud Einstein includes Einstein Lead Scoring, Einstein Opportunity & Account Insights, and Einstein Activity Capture, and is $50 per user per month. Existing customers with Sales Cloud Lightning CRM SKU or Service Cloud Lightning CRM SKU EE/UE will be able to buy Sales Cloud Einstein (Spring '17). 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 Spring '17 is available in English only.

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

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