Success Guides for Your Salesforce Einstein Journey

Stage of Journey: I’m Learning or Seriously Considering Purchase
Guide 1: Is Einstein right for you, right now?

Stage of Journey: I’ve Purchased Einstein & Need to Implement
Guide 2: Get Einstein fully adopted in your org

Stage of Journey: I’ve Implemented Einstein But I’m Not Happy
Guide 3: Get your results soaring with Einstein
You are learning or seriously considering a purchase. How exciting! To get you started on this journey, first is a primer of AI & Advanced Analytics on the Salesforce Platform.

Then, we share what you need to know to get started with Salesforce Einstein, and how to know if you are ready for it today.

What advanced analytics like Einstein can do in Salesforce

If you’re interested in using data to drive incremental revenue, greater profitability and better customer experience, then advanced analytics is just the ticket. It can analyze large volumes of data and generate powerful insights. It can recommend specific actions to empower front-line users.

Underneath the covers, this work is done by analytic techniques such as predictive modeling, propensity analyses, artificial intelligence, and machine learning. As we discuss later in Guide 3, much more than technical expertise is needed. Strategic thinking and deep industry/domain knowledge are crucial.

What is Salesforce Einstein?

It is the branded umbrella of AI & advanced analytics capabilities from Salesforce. It runs seamlessly within your Salesforce Org, from data infrastructure to the customer interface.

Einstein has the following major components that you can purchase:

- Reports and Dashboards
- Discovery
- Prediction Builder
- Voice
- Chatbot
- Vision
We’ll focus on the first three here: Reports and Dashboards, Discovery, and Prediction Builder. They are the foundation of your advanced analytics strategy. They can be applied in many use cases to achieve Sales & Marketing goals. The latter three (Voice, Chatbot and Vision) apply to specific use circumstances, and we’ll talk about them in-depth at a later date.

The benefits of applying advanced analytics in Salesforce:

- Get insights across several fields and relationships
- Identify key drivers of behaviors for customer, channel, and sales
- Predict and execute actions to provide tangible, incremental value

Actions taken by the right Salesforce user at the right time can produce consistently superior results compared to basic analyses.

**Here’s what you need to get going**

**What would you like AI to do for you?**

Let’s start with expectations. Who and what is driving the need to take this journey? Where do you want to make the most impact? Which of the following drivers do you most identify with?

- Customer Facing – Re-imagine and transform your customer experience
- Systems Facing – Consolidate tools, processes and systems that are getting out of hand
- Market Facing – Competitive factors that you must address or face market erosion
- Enterprise Facing – Scale your company’s growth and profitability

**What are your business goals?**

From a sales and marketing perspective, goals can be straightforward:

- Gain insights about customers (customer 360 view)
- Acquire customers efficiently
• Grow revenue and profitability per customer
• Gain loyalty and increase lifetime value

To achieve these goals, your Salesforce org and Einstein together can provide:

• Business intelligence and insights – Know your customer well and share this across stakeholders
• Selling guidance – Put key data in the fingertips of users and channels where customers interact
• Full-fledged predictive capabilities – Create models and recommendations to grow customer value

What is your Salesforce environment today?

Your Salesforce setup is a huge factor in how quickly you can get value from Einstein. Salesforce should not only be up and running, but you should have full adoption (preferably in Lightning, yes?) and Salesforce should be part of everyday use.

Without this in place, investing in Einstein won’t make sense. There won’t be enough data, adoption, or cultural readiness.

Also important to how Einstein will fit into the stack:

• Salesforce edition – Enterprise, Performance, Unlimited
• Cloud – Sales, Service, Marketing, Financial Services
• Instance – Single, Global, Multiple and license structure

If you have external tools such as Heroku for the data models, or Informatica/Mulesoft for integration, these must also be considered because they can affect Einstein architecture and implementation.
How to tell if you're ready for Advanced Analytics & Einstein

Before you sign on the dotted line, assess if your company is ready to make the most of the licenses right now. You may be ready. You may need to put some practices in place first. Ask yourself the following questions.

These questions give a glimpse into how quickly you can get Einstein up and running, gain adoption and show tangible ROI:

Have you established a culture of analytics?

Culture is not always difficult to measure. It is often hiding in plain sight!

Do your teams create and share reports and dashboards on an ongoing basis? Are there champions in each department or line of business who are hungry for more data and insights? Is there a Know Your Customer (KYC) initiative that seeks to get a 360 view of customers? And does your leadership set tangible goals that cascade down to the customer level?

Culture is not about having an army of data scientists. It is about valuing, using, and acting on data and information when making decisions. From the executives to the front lines. Do you see signs of this in your organization?

Is Data Quality in place?

Don’t wait until you’re close to signing the contract or implementing Einstein. Clean data is crucial to reliable analytics. But the data cleansing step is a lot harder than it seems. It should be started as early as possible in the process.

You may discover poor legacy practices, gaps, broken links (for householding or company hierarchy), and obsolete data. You might find a lack of established processes that are critical to have in place.

Data correction, transformation, and enrichment have to be done in order to produce reliable segmentation, models and reports.
Get visibility into the timeline for data preparation and transformation. You could factor this timeline in to when Einstein licenses should become active and when you start paying for the licenses. We wouldn’t recommend Einstein to your Salesforce users until data is cleaned and prepared for Einstein.

You can refer to our ProsperServe Managed Data Services for an idea of data quality steps to have in place.

Have you identified specific use cases?

This is the proverbial “rubber meets the road” where advanced analytics can be used for customer-facing interactions to drive desired outcomes. For example, customer attrition models might predict the exact time of peak risk for closing an account or decline in activity. Map out the specific touch points going back in time across all channels and build out the cadence of touches, channels, messaging, and offers.

Then, create reports that compare to a control group or baseline to determine the additional value (like customers, revenue, profit, account balance) that were produced.

Are you clear on the costs and ROI?

There is no doubt about the value of implementing Einstein. We know from customer case studies that it pays for itself many times over.

That said, build an ROI framework that is suited to your needs. It should include direct and indirect costs related to implementing Einstein. On the revenue side, it should include measures like expected additional sales, customer retention and contract renewals. Don’t forget to include any savings from replacing other tools and processes.

Capture all licensing, data transformation, data acquisition, implementation and onboarding costs. For each of the business goals to be improved by Einstein, identify
three levels of potential gains (i.e., reduction in customer attrition by 5%, 7.5% and 12%), how many customers you will save, how much revenue you will save.

Start with a simple ROI model rather than a complex one. Be conservative with expected gains, acquire buy-in from key stakeholders for all the variables and calculations, and establish set times when results will be reviewed.

What alternatives are on your radar?

Before you launch into Einstein, also look at other options. They may satisfy your initial requirements for advanced analytics, and get you ready for a future Einstein purchase. The AppExchange has apps that provide analytics features, including our Prospervue sales acceleration app for Salesforce, which complements Einstein.

Are you trying to fix a broken process with Einstein? If so, heed the warning that Einstein will not fix process problems. It may amplify them. Instead change the processes first before investing in Einstein. Then, you’ll be more likely to see results with Einstein, and you’ll see them faster.

Summary

- Fully leverage Salesforce – Have you set up all functionalities in Salesforce for data, analytics and users?

- Do process improvement – Are you trying to fix a broken process with Einstein? If so, heed the warning that Einstein will not fix process problems. It may amplify them. Instead change the processes first before investing in Einstein. Then, you’ll be more likely to see results with Einstein, and you’ll see them faster.

- For due diligence – Review other Salesforce analytics apps and functionality as alternatives.

While the promise of AI is alluring, it may not be a good fit for every time and circumstance. This can be especially true for Einstein. First, ensure you draft your requirements, include stakeholders, assess internal processes/data, and outline clear goals and ROI.

Once you’ve answered the questions above, evaluation of Einstein is next. Review existing Salesforce capabilities, data warehousing requirements, and user feedback. Map that to Einstein licenses and implementation needs.
Congratulations! You have embarked on an exciting journey to transform the way you do business. You have great expectations for improving your sales process, customer experience, and enterprise profitability. This guide about Salesforce Einstein implementation will help you to achieve your expectations for Einstein analytics.

Prior to starting the implementation, we recommend that you get your house in order through a series of steps:

- Understand Advanced Analytics, AI & Einstein
- Set Expectations for AI
- Define Clear Business Goals
- Prepare Salesforce Environment
- Do a Readiness Assessment

Get the detailed rundown of these steps at Guide 1 in this three-part series.

A 9-point checklist for implementing Einstein

Here are the next steps for implementation. We’ll discuss each of these in more detail below:

1. Create the core team
2. Gather business and technical requirements
3. Design the data architecture  
4. Identify data transformations and processes  
5. Define segmentation and personas  
6. Set up integrations  
7. Build, train and deploy models for each business outcome  
8. Create reports for insights vs. actions  
9. Establish ongoing maintenance program

1. Create the core team

<table>
<thead>
<tr>
<th><strong>Salesforce Einstein Implementation Core Team Members</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Steering/Executive Leadership</strong></td>
</tr>
<tr>
<td><strong>Project/Change Management</strong></td>
</tr>
<tr>
<td><strong>Product or Line of Business</strong></td>
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<tr>
<td><strong>Data &amp; Insights</strong></td>
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<td><strong>Salesforce/IT</strong></td>
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<td><strong>Advanced Analytics</strong></td>
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2. Gather business and technical requirements

Requirements are essential to define the scope of the project. These are provided by line of business owners and the executive team. They are a wish list for the ideal state.
Also the reporting, IT and analytics teams can provide requirements based on existing processes and deliverables. And they should also envision a re-imagined state that’s made possible by new analytic capabilities, data availability, and reporting options.

Involve all stakeholders, make this fun!

The requirements should address these major topics:

- Database Structure
- Data Access & Quality
- Visualization & Distribution
- Execution & Actionability

Now, prioritize! Once you pull together the requirements, put them into three buckets:

- Must have
- Nice to have
- Out of scope to explore later

Don’t miss this prioritization – it’s an important step to keep the project moving forward and avoid the dreaded scope creep.

3. Design the data architecture

The data model (also called data warehouse or data mart) is a framework of how the data structure is set up to support reporting, predictions, and the delivery of recommendations used in Einstein.

It needs to accommodate:

- Data from different original sources
- Transformations and storage of transformed data
- Different levels of granularity needed for the end uses described in requirements.

The architecture should also include how the data is migrated into/out of the warehouse with details of frequency, volume, and fields involved.

Data models can be built inside Salesforce. Or they can be built externally using data platforms like Heroku, or completely outside the Salesforce Platform with results fed into update Salesforce. Each of these has their pros and cons. So take time to arrive at the right solution for you.
4. Identify data transformations and processes

Transformation is the modification of source data to add value for analytics. It is perhaps the most important aspect of this exercise, but it’s often overlooked. Some types of transformations are:

- Summarize
- Categorize
- Reduce
- Derive

Each of these transformations requires well thought out processes. The processes should allow you to scale and support multiple use cases, for example across products, geographies or customer segments.

“Transformation is the modification of source data to add value for analytics. It is perhaps the most important aspect of this exercise, but it’s often overlooked.”

5. Define segmentation and personas

Following transformations, segments and personas give a handle on how analytics should be built and delivered.

This is also when the use cases must be paired with the segments so that you can create actionable “plays” for sales and marketing to drive outcomes.

6. Set up integrations

After you collect, transform and segment the data, the next step is to connect everything in scope. Configure the key integrations between data warehouse to Salesforce, to Einstein, and to other clouds (i.e., Marketing Cloud, Service Cloud).

You can set up an intermediate staging area between warehouse and other integrations to handle transformations, cleansing and append. The refresh sessions must factor in the frequency, volume and granularity of data.

7. Build, train and deploy models for each business outcome

Here comes the fun part! It’s time (finally!) to deliver on the dream of “right customer, right time, right offer.”
Based on the requirements, you have created the data, transformations and segments. Using Einstein Discovery, you can build models for each of the scenarios such as cross-sell, retention and product penetration.

Then map out which user will get the output of each model, and weave this into their call scripts, customer interactions, and day to day operations.

For example, if a customer is deemed likely to attrition, initiate conversation about suggestions on how they can get more out of their existing relationship like taking advantage of subscription pricing, moving balances to higher interest deposit accounts, etc.

Without this mapping and clarity of process, the models and recommendations will not be used to their full potential. And worse, they can be interpreted incorrectly. The consequence is, your return on investment in Einstein may be delayed or not materialize.

This can be avoided by tying the Einstein recommendations to specific Salesforce users and their daily tasks.

“Map out which user will get the output of each model, and weave this into their call scripts, customer interactions, and day to day operations.

8. Create reports for insights vs. actions

A common mistake made with Salesforce Einstein implementation is with reporting. Often, users create one set of reports to try to serve many masters. But, there are in fact two distinct types of reports that should be generated by Einstein:

- Exploratory reports
- Action-oriented reports

The first kind of report is exploratory. It generates insights so leaders and decision-makers can better understand the customers, product and markets. These reports cover broad trends, and tend to be stable over time. They provide both leading and lagging indicators that drive the business.

The second kind of report is action-oriented. It is geared for the front lines or anyone directly involved in the customer experience – including the websites and mobile apps. These reports have to be time-sensitive and granular. They provide one action recommendation at a time, to be followed by another recommendation based on the customer response. Think of this like a survey with question path changes based on the previous response.
Providing both these types of reports will go a long way to making Einstein serve – and satisfy – many masters!

9. Establish ongoing maintenance program

While still in the development phase, it is critical to also plan for future maintenance. Get commitment from the entire organization. This involves maintenance of each of the above steps, such as requirements, design, architecture, reporting, and feedback on the actions.

- Re-visit the requirements to see if any assumptions, business models, or market environment changed since starting the project
- Look at data sources that may have become obsolete or otherwise changed
- Review the data quality practices and identify areas of improvement
- Evaluate the segments and see if these are still valid; these are especially fast changing
- Conduct tests to determine if change in performance is statistically significant (like decrease in attrition, increase in average account balances)
- Calibrate or modify the models at least once a year; build the foundation and capability to deploy several models simultaneously (like touch frequency + next best offer)

Should you do implementation in-house or hire an external consultant?

There are a few options for who can implement Einstein. You can:

- Do it internally
- Use a Salesforce systems integrator
- Engage an Einstein specialist

Let’s look at the differences to help you decide which is a better fit for you.

Doing it yourself

A successful Salesforce Einstein implementation requires a team. Choose representatives (as many people as you need) from functional areas where you need:

- Initial requirements
- Sign-off on key stages
Ownership to implement
Report lessons learned to their areas

The important thing here: These teams and representatives should meet quarterly for the next one to two years to refine and improve initial deployment.

What are the risks? The team might not have the experience, bandwidth or chemistry to make all this happen.

The good news is even if you decide to seek an outside partner, this internal team will allow you to quickly absorb the integration, reduce friction to change, increase adoption and achieve ROI.

So, assemble this team whether you do the implementation internally, or hire external help.

Using a Salesforce systems integrator

Einstein is a Salesforce product and therefore it requires deep knowledge of the inner workings of your Salesforce Org. The objects, fields, data, relationships, workflows, triggers, license provisioning, permissions, and so on must be configured properly. There can be no lingering or outstanding issues of the core implementation itself.

Advantages of Systems Integrators

A traditional systems integrator (SI) brings such technical knowledge and experience. This skill set is objective in nature: it’s pretty much black and white as to steps that must be taken. An SI can install Einstein in your instance, provision the authoring and distribution license, map the fields, and set up reports so you’re “up and running.”

Choosing to work with an SI is ideal if they know your business really well and have deep industry knowledge. An SI can be a great asset if you are new to Salesforce and the infrastructure still needs to be sorted out.

Disadvantages of Systems Integrators

On the other hand, SIs often lack expertise in many aspects of data driven processes. Unlike the base implementation of Salesforce, which is a technical endeavor, implementing advanced analytics like Einstein requires full understanding of the data life cycle from creation, transformation and modeling, to execution. SIs may not have capabilities to solve your data issues, or recommend best practices based on experience in a multitude of industries, use cases, tools, platforms, and modeling environments.
It’s important to know the role that a systems integrator can, and likely cannot, play. Where the SI’s knowledge leaves off, you will need expertise in data, analytics, and your industry.

“If you value a consultant who leads with strategy not technology, an Einstein analytics specialist can be the right fit.”

Working with an Einstein analytics specialist

Although a specialist like Valgen is a partner within the Salesforce consulting program, when it comes to Einstein they differ significantly from nearly all other SIs in three key aspects:

1. Roots in analytics

First, typically the core DNA of their practice is rooted in real-world advanced analytics with decades of experience. Einstein is a recent arrival. The practices of predictive analytics and AI for business intelligence have been around for a long time! If this analytics experience is important to you, a specialist may be a great fit.

2. Strategic Salesforce Einstein implementation

The second major difference is that analytics specialists see Einstein as a strategic, not a technical implementation. Strategy is the root of all the steps:

- From the ground up with discovery and design
- While documenting your current practices and future needs
- When capturing the desired vision/future state and designing how to bridge this gap

That’s why this implementation is equally subjective and objective, part science and part artistry. So if you value a consultant who leads with **strategy not technology**, an Einstein specialist can be the right fit.

On the flip side – specialists may lack the army of consultants and certifications, and the perceived comfort blanket that these bring. They also may not have hundreds of projects in online reviews, because they don’t take on migration, CPQ, custom development, and a plethora of projects that a general Salesforce consultant takes on.

But because Einstein specialists are focused on Salesforce analytics – and often just a handful of industries – they more than offset the size advantage. The strategic quality of the work offsets quantity of technical projects.
3. Data quality and advanced analytics

The third and perhaps most important differentiator is that specialists work with advanced analytics as an entire ecosystem. This includes data architecture, data quality, and data transformations that are key to getting the best predictions and reports.

In contrast to a general SI that tends to gloss over the poor data quality in your organization, the analytics specialist will pour over the details to identify flaws and weak points. They will recommend – and likely insist on – corrections. Because, they know that poor data quality can derail your ability to create accurate and reliable predictions. You would miss out on generating revenue and profits that are consistent and scalable. Clean data will prevent that outcome.

If you already deployed Einstein and you’re not happy with the results, see Guide 3 – the next Guide in this series to help you to be successful with your Salesforce Einstein implementation.
Come on in and take a seat. We are ready to listen. Here, we bring Salesforce Einstein help, so hopefully you will soon be thrilled with results. In this Guide, you will find common problems and how to diagnose and fix them.

First, let’s go back to the time before you started with Salesforce Einstein. Because when you make the decision to use Einstein, there are some factors to look at. If you don’t address them early in the process, they can cause issues later down the road.

Take a look at Guide 1 of this series, and see if you missed anything that is affecting you today:

- Understand Advanced Analytics, AI & Einstein
- Set Expectations for AI
- Define Clear Business Goals
- Prepare Salesforce Environment
- Do a Readiness Assessment

Also, did your process follow close to this checklist we share in Guide 2? You might find root causes of dissatisfaction here:

1. Create the core team
2. Gather business and technical requirements
3. Design the data architecture
4. Identify data transformations and processes
5. Define segmentation and personas
6. Set up integrations
7. Build, train and deploy models for each business outcome
8. Create reports for insights vs. actions
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Now, let’s dig into common reasons why Einstein implementations fail to deliver on the promised dream, how to fix this, and how quickly you can get back on track.
Business issues

The Salesforce Einstein analytics journey starts with goals. You know what you need to achieve, and you want Einstein to deliver on it. Maybe you want to increase revenue, improve profitability, boost lead conversion, or reduce customer churn.

When Einstein implementations fail, we’ve seen that the project team didn’t get agreement with all key stakeholders on goals, scope and metrics. Thus, all stakeholders should agree from the beginning.

So even if you’ve already implemented Einstein, go back and take stock. Were clear goals set?

Here are tips to help:

- Limit the scope of your Einstein goal to one team or channel. This makes it easier to measure success. So for example, rather than set a goal to “reduce customer attrition to 5%” set a goal to “reduce customer attrition in warranties for commercial segment to less than 5% versus current 8%.”

- Measure results toward goals within 6 months. In this window, you can influence short-term goals like campaign results, sales rep productivity and lead conversion. If you set a longer timeline, other variables can affect the results. This raises the risk that measurements could be invalid or inconclusive.

It’s also important for your executive, business and technical teams to agree on the reasons why Einstein was not successful. Document lessons learned and align on the new goals.

“Rather than set a goal to “reduce customer attrition to 5%” set a goal to “reduce customer attrition in warranties for commercial segment to less than 5% versus current 8%.”

Data issues

Dirty data

The success of Einstein can be affected by a lack of accuracy or reliability. This kind of problem often starts with the data that’s extracted from source systems. Then, the problem is passed into Einstein.

Data is like water flowing to your house from a source. Imagine if your municipality pulled water from a lake and piped it directly to your house. No, they don’t do that – it
would be full of stuff you don’t want in your water. Instead they invest in treatment facilities to clean and deliver safe water. When there are problems with water, usually the problem is not the delivery closest to you, like the faucet. The problem is further upstream, where the water comes from.

If you have accuracy and reliability problems, look at the source data.

**Data interruptions**

If reports and dashboards become unreliable after setting up Einstein and mapping data to it, the data feeds could be coming intermittently. Re-check the sources, transformations, and ETL/migration processes. Confirm that there are no broken linkages.

**Analytic model inaccuracies**

AI and predictive analytics models can be inaccurate or inconclusive due to a few reasons:

- The underlying customer segment changed
- Data are now different than when the models were built
- Your data science team lacks sufficient skills to model accurately

In the chart below, we list issues that can be overlooked during the implementation. These steps are often missed when setting up Einstein, due to time pressure, lack of resources, or technical ability.

<table>
<thead>
<tr>
<th>Issues</th>
<th>Possible Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duplication and redundant records</td>
<td>Install deduplication tools. Build more rigorous householding methods customized to your needs.</td>
</tr>
<tr>
<td>Conflicting data</td>
<td>Before loading to Einstein, centralize the processing to resolve differences across sources &amp; fields.</td>
</tr>
<tr>
<td>Incomplete or inaccurate data</td>
<td>Create validation procedures. Append additional and recent data, exclude unusable data.</td>
</tr>
<tr>
<td>Poor prediction accuracy for models</td>
<td>Data preparation like cleansing, transformation and formatting to fine-tune the models.</td>
</tr>
</tbody>
</table>
Structural issues

Next, we share the challenges caused when converting from legacy systems. Plus “band-aids” that were used can cause problems later.

Sometimes, hand-offs between IT and business analytics teams might not be well coordinated. One team might add data or tables without informing the other team. This could affect performance.

Here are ways to identify impact on performance, and how you can fix them:

<table>
<thead>
<tr>
<th>Issues</th>
<th>Possible Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Too many processes and flows to manage</td>
<td>Create central staging tables to consolidate processes vs. direct Salesforce feed. Streamline and remove redundant flows.</td>
</tr>
<tr>
<td>Loading jobs are slowing systems down</td>
<td>Jobs are consuming more resources. Evaluate latency, volume and frequency of loading. Re-prioritize and restructure jobs to reduce load.</td>
</tr>
<tr>
<td>Data volume and granularity (row detail) increasing significantly</td>
<td>Consider external database structures like Heroku or external objects.</td>
</tr>
<tr>
<td>Unexpected changes in data feeds, reports, and results</td>
<td>Improve documentation and hand-offs. Check authoring rights, permissions and ownership.</td>
</tr>
</tbody>
</table>

User issues

During implementation, Einstein must be designed to serve two purposes.

One of the most important purposes of Einstein is to deliver actionable insights to front line Salesforce users. Another purpose is to empower users to execute on the recommended actions and alerts.

The following poor implementation practices can affect Salesforce users:

- Delays in getting refreshed, updated data. Because when the most recent or valid data is not available, the users may stop believing the output from Einstein.
Not assigning the right license or Salesforce permissions to users. Incredibly, not having the right views and data due to permission restrictions can cause users to not get the full benefit from Einstein.

Actions and systems are not connected. A good recommendation engine alone is not enough. The recommended actions must seamlessly fit into the user’s daily tasks and activities in Salesforce.

Revisit your implementation to see if any of these are affecting your users.

In addition, users can think that Einstein is not for their benefit. They think it’s yet another tool pushed from above to monitor them. Or, user onboarding did not clearly explain the benefits and build enough confidence or clarity in what users are supposed to do. We identified some solutions:

<table>
<thead>
<tr>
<th>Issues</th>
<th>Possible Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>User does not understand why they should use Einstein recommendations</td>
<td>Show examples of other users in your organization who successfully use recommendations and benefit from them. Share use cases and results from other similar organizations.</td>
</tr>
<tr>
<td>Users can’t clearly see the benefits they achieved</td>
<td>Build a leaderboard or gamify. Compare incremental revenue (or other goal) for users vs non-users.</td>
</tr>
<tr>
<td>Not all data is readily available; user must still use multiple systems</td>
<td>Re-assess the data that is needed for key workflows from beginning to end. Add missing data.</td>
</tr>
<tr>
<td>After enthusiastic launch, adoption wanes or is inconsistent</td>
<td>Continue to paint the long-term vision. Rally team around the customer experience they can relate to. Show short-term fast wins toward the long-term vision.</td>
</tr>
</tbody>
</table>

**Summary**

Though you might not be entirely happy today, not all is lost!

As a starting point, go back to the basics of the initial vision and plan. Diagnose the cause of discontent across the “data – structure – users” chain. By doing this, you will identify weak spots.
Then focus on the most problematic area and make the corrections.

Re-start a pilot with limited scope, and openly share learnings. If you found success, clearly document it and then continue to roll out and gain adoption.

If changes were not fruitful, continue to the next diagnosis and follow the limited pilot process again. This is not necessarily a terrible thing. Because when you isolate one or two changes at a time, you can isolate the problem. As a result, there’s a better chance of solving the problem.

It’s all worth it, because two things are certain in today’s business climate:

1. Advanced Analytics & AI like Salesforce Einstein are proven to transform businesses and grow customer value.

2. If you don’t invest and get it right, your competitors and the larger market surely will.

Valgen delivers data quality and analytics services for sales and marketing teams. As a Salesforce Einstein analytics specialist, we have expertise in areas important to success: Salesforce, database structure, data cleansing, predictive analytics, sales and marketing strategy.

We serve enterprise and mid-market B2B customers worldwide in fleet and transportation, high tech and financial services.

Valgen is a Salesforce consulting partner and Salesforce ISV partner.

Visit us at valgen.com/einstein

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