AI IMPLEMENTATION CHALLENGES AND THE PATH TO SUCCESS VIA SALESFORCE

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In today's fast-paced tech landscape, businesses are increasingly aware of the rapid evolution of AI and are concerned about keeping up with their competitors. But here's the catch: many are unsure about where to start with their first AI project. It's like standing at a crossroads. Everyone wants the benefits of AI, but figuring out that first step can be tricky. This article is all about tackling this challenge. We'll explore the concerns companies have, and we'll give you practical advice on how to choose and kick off your first AI project.

Projected to surge by almost 20% and exceed $50 billion in 2024, this projected increase in spending is being driven by a collective industry shift from experimental endeavors to large-scale production solutions. While the ambition to stay ahead is palpable, the divergence between conventional digital transformation projects and the unique processes inherent in AI initiatives introduces a distinct challenge: uncovering the nuanced components of AI projects and determining the appropriate methodologies for their execution. These uncharted territories present management with the task of navigating potential risks.

This article describes the challenges of a typical AI project, focusing in particular on how Salesforce has addressed some of those challenges and the AI use cases that already have measurable and proven business value. While Salesforce is heavily invested in AI and has many new features in the works, this paper will focus on the simple things readily available today with tools and solutions that can help you start your successful AI journey.

AI Prerequisites and Challenges

Capitalizing on AI requires careful preparation and the fulfillment of several key prerequisites.

1. **Data:** High-quality and plentiful data forms the backbone of AI. Your business needs a robust data infrastructure that includes well-organized and clean information. Efficiently collecting, storing and managing this information is crucial to enable AI algorithms to learn and make informed decisions.

   Challenge: How do I determine when my data quality and structure is good enough to be effective?

2. **Clear Objectives and Commitment:** Define specific, measurable goals for how you plan to leverage AI. Understand whether it's improving customer service, optimizing operations, or enhancing product recommendations. Having a clear roadmap that details the potential return and commitment from leaders is essential.

   Challenge: How do I determine the ROI of an AI implementation and how can I measure it?

3. **Talent:** New talents are essential due to the unprecedented complexity and sophistication of modern AI algorithms, which demand specialized skills in data analysis, machine learning, and domain-specific knowledge to navigate intricate models, interpret complex data patterns, and develop tailored solutions. Additionally, the rapid pace of AI advancements necessitates professionals who can adapt to and harness emerging technologies, ensuring organizations stay at the forefront of innovation. This includes data scientists, machine learning engineers, and domain experts.

Challenge: What is the best way to build this team of talent?

4. **Infrastructure, Scalability, Integration:** Data Storage and Management, Computational Resources, Development Tools and Frameworks, Security and Testing tools, Backup and Recovery are all essential components of an AI Solution.

   Challenge: Can I use what I have to reduce cost and disruption? What is missing?

5. **Testing and Validation:** Testing AI is quite often a completely new discipline for organizations. Choosing tools and processes which are compatible with the project is key. In many projects, UAT involving domain experts and end users must be brought in much earlier than normal. They must score results in a wide array of acceptance criteria that is very specific to each project. The types of criteria that needs to addressed include, clarity of output, model transparency (can I derive the data that produced this output for validation purposes?), and consistency and reproducibility (do similar use cases provide similar responses?). So the real challenge is that with every project, the definition of a successful test case can be somewhat subjective and needs to be defined with the end user in mind at all times.

   Challenge: How do I define the acceptance criteria for an AI project?

6. **Change Management and Feedback loops:** AI is a learning and adaptive solution. Proper training of your workforce is critical to clearly identify how AI results can be effectively used as well as having procedures in place for users to provide feedback. AI solutions need to be continuously monitored and adapted.

   Challenge: What is the safest and most effective way to utilize and improve the features and benefits of this AI project?

Some of these challenges may seem a bit daunting at first glance. The answers to these questions will be closely aligned to the types of solutions which are being considered. Salesforce has made great progress in AI technology, providing proven and tested solutions that are easily instrumented using the existing platform, tools for calculating ROI and tools and criteria for determining if your organization is mature enough and prepared for any particular solution.

The remainder of this article will detail the current solutions and tools available out of the box with the Summer '23 release for Sales Cloud and Service Cloud.

Salesforce Sales Cloud Tools

1. Sales Cloud Einstein Assessor

To initiate the Sales Cloud Einstein Assessor, navigate to the Einstein Assessor section of Setup and instruct Salesforce to generate a report from production or sandbox orgs. Typically, within 24 hours you will receive a report that details the readiness your org has for various Sales Cloud AI features. The Assessor evaluates readiness for Einstein Opportunity Scoring, Einstein Lead Scoring, Einstein Activity Capture, Einstein Opportunity Insights, Einstein Account Insights, Einstein Automated Contacts, and Einstein Forecasting.

See the definition below of these various AI features and the kind of prerequisites that the Assessor is looking for to evaluate your readiness.

2. Einstein Opportunity and Lead Scoring Estimated ROI

If you have enough data, Salesforce will calculate the ROI of Opportunity and Lead Scoring and will provide those estimates as part of your Sales Cloud Einstein Assessor report.

3. Einstein Conversation Insights Assessor

Conversation Insights enables you to use NLP to analyze audio and look for key indicators that would trigger recommended actions based on customer interaction. Conversation Insights can highlight key elements like mentions of competitors, product discussions, custom keywords, pricing mentions, or next steps discussed during the conversation. This allows users to quickly identify crucial points from lengthy discussions.

There are some technical requirements for the use of Conversation insight and the are assessed by the Einstein Conversation Insights Assessor Initiated from Einstein Assessor, this tool checks if you are using supported video/audio provider, that lightning experience is enabled and that you have implemented a role hierarchy.

Salesforce Sales Cloud AI Solutions

There are so many available AI features that sometimes it is difficult to determine which ones might be applicable to your organization and what are the prerequisites necessary to use them. The compiled list below is to assist in your analysis.

1. **Einstein Lead Scoring:** Uses machine learning to score leads based on their likelihood to convert, allowing sales reps to focus on the most promising opportunities.

   Prerequisites: Lead Scoring requires a Sales Cloud Einstein License. You can enable it immediately, but it will start providing useful lead scores when you have created 1000 leads and have converted 120 leads to an account/contact within the last 6 months.

2. **Einstein Opportunity Scoring:** Provides real-time insights into opportunities, such as the likelihood of closing, the next best step, and potential roadblocks.

   Prerequisites: This may be the easiest and first feature to implement because it is available with your Sales Cloud License. You must have at least 200 closed won and 200 closed lost opportunities in the last 2 years, each with a lifespan of at least 2 days before the Opportunity Scores will be useful.

3. **Einstein Activity Capture:** Automatically logs emails, calendar events, and other sales activities into Salesforce, so reps can spend less time on data entry.

   Prerequisites: This is another feature that is readily available with your Sales Cloud Licenses and can be a real time saver. It requires that you have integrated with Google™ or Microsoft® , and have at least 30 accounts, contacts, leads or opportunities.

4. **Einstein Opportunity Insights:** Provides sales reps with updates about their opportunities as they progress. It Includes predictions about which deals are likely to be won, reminders to follow up and notifications when a predicted key moment will be taking place in an opportunity.

   Prerequisites: Requires a Sales Cloud Einstein License and Einstein Activity Capture. At least 20 opportunities must be closed in the last 6 months and the median lifespan of closed opportunities needs to be more than 7 days.

5. **Einstein Account Insights:** Provides updated news related information to accounts from reputable English language news sources. Activity related insights are also added to accounts from recent email and events.

   Prerequisites: Requires a Sales Cloud Einstein License and Einstein Activity Capture. At least 30 business accounts must be available.

6. **Einstein Automated Contacts:** Einstein either automatically adds or suggests new contacts that should be added to accounts. These suggestions are based on email and event activity.

   Prerequisites: Requires a Sales Cloud Einstein License and Einstein Activity Capture. If person accounts are used at least 50% of accounts must be business accounts and there must be a minimum of 30 business accounts.

7. **Einstein Forecasting:** Predicts future sales performance, so sales managers can set realistic goals and allocate resources effectively.

   Prerequisites: Requires a Sales Cloud Einstein License. You must use a fiscal year, have at least 12 months of opportunities, Collaborative Forecasts are enabled, Forecast is measured by opportunity revenue and the forecast hierarchy must include at least one forecasting enabled user who reports to a forecast manager.

8. **Einstein Conversation Insights:** Uses NLP to analyze recorded conversations to indicate key elements such as mention of competitors, product, custom keywords, pricing discussions or next steps.

   Prerequisites: A supported video/audio provider, role hierarchy definitions and lightning experience enabled.

Salesforce Service Cloud Tools

1. **Service Cloud Einstein Assessor**

   To initiate the Service Cloud Einstein Assessor, navigate to the Einstein Assessor section of Setup, and instruct Salesforce to generate a report from production or sandbox orgs. Typically, within 24 hours you will receive a report that details the readiness your org has for various Service Cloud AI features. The Assessor evaluates readiness for Einstein Case Classification, Einstein Case Wrap-up, Einstein Article Recommendation, Einstein Case Routing, and Einstein Reply Recommendation. These

various Einstein features are described below as well as the types of prerequisites that the assessor evaluates for readiness

2. **Einstein Bots estimated ROI**

    A simple but elegant calculator for determining the ROI based on the cost reduction that AI Bots will realize by the expected rate they will deflect cases away from live agents.

Salesforce Service Cloud AI Solutions

1. **Einstein Case Classification:** Learning from closed cases, Einstein builds a prediction model unique to your org. Using that model Einstein can suggest values for selected fields when a case is created. The goal being a drastic reduction in agent case management.

    Prerequisites: Service Cloud License. 400 closed cases in the past 6 months, best results are 10,000 cases. Case subject and description cannot be encrypted.

2. **Einstein Case Wrap-Up:** Evaluates chat transcript language patterns to predict and suggest fields that need to be updated on a case when the chat ends.

    Prerequisites: Service Cloud License. Experience Cloud/Chat enabled, 400 closed cases with chat transcripts in the past 6 months with best results at 10,000 closed cases

3. **Einstein Article Recommendation:** Recommends Articles that may answer customer questions before an agent is required.

    Prerequisites: Service Cloud License, Experience Cloud, Best results with at least 500 articles attached to cases in the last 2 years.

4. **Einstein Case Routing:** When Einstein Case Classification updates a field on a case Einstein Case Routing will determine the correct agent or queue for the case.

    Prerequisites: Service Cloud Einstein License, Einstein Case Classification, At least 400 closed cases in the past 6 months.

5. **Einstein Reply Recommendation:** A prediction model based on closed chats is created to provide real-time suggestions to agents on recommended replies.

    Prerequisites: Service Cloud Einstein License, Experience Cloud/Chat enabled. 1000 closed chat transcripts that contain four or more chat turns.

6. **Einstein Bots:** Bots can be deployed in Experience Cloud or multiple channel deployments like websites, mobile apps, social messaging platforms and SMS. Powered by NLP, Einstein Bots can understand and respond to natural language questions and requests. They integrate to the Salesforce data including knowledge source to provide self service support. Real-time insights and analytics are processed to refine responses over time, determine customer sentiment and automatically hand off to live agents.

Prerequisites: Service Cloud Einstein License, Chat or messaging license, Salesforce Knowledge, 500-1000 chat transcripts for FAQs or agent routing, 5,000-10,000 transcripts to provide personalized recommendations.

How Salesforce Addresses AI Challenges

The question now is how does Salesforce help solve or accelerate your progress toward your AI initiatives. Let's revisit the key challenges and evaluate how they can be addressed.

Data – In most AI projects, this is the heavy lift. Where do I get my data, how do I determine if it is of high enough quality and how do I structure it for my AI use cases? The beauty of implementing these Salesforce AI solutions is that the data is already structured, you are familiar with its structure, and Salesforce provides tools to determine if the quantity of data is enough to generate accurate results. The only thing you need to do is analyze the quality of your data.

Clear Objectives and Commitment. Salesforce has focused on some tried and proven areas where AI is going to give you immediately identifiable benefits and ROI. There are even tools to calculate ROI based on years of experience using these solutions in the market. It will be a fairly easy task to choose features that are going to be most applicable to your organization and provide the justification for investment.

Talent – Salesforce provides some initial trailblazer modules which can help train your teams. But the fact is that the technology is moving so fast that at the moment these are lagging behind. You may want to look for outside talent on an initial project to help train your teams or pick a project that is low risk and simple as far as implementation and validation and have your teams learn as they go.

Infrastructure, Scalability, Integration: This is another tough one for architects in typical AI projects. However, with the AI features discussed in this article, the infrastructure/platform is already in place and the scalability and integration issues are easily evaluated.

Testing and Validation: This is the big unknown with AI projects. Salesforce really doesn't provide any mechanism or tool to validate the results of Einstein AI. They do however have some experience with the quantity of available data and when that converges to useful generative responses from the AI model. Some people joke that one of the main components to a successful AI project is patience. You may not get exactly what you expected at the end of a project, because the model needs to improve over time.

Here you need to get creative to describe what is an MVP implementation of your AI project. You need to involve domain experts and end users early and focus on acceptable definitions of clarity, transparency, and consistency. If your project has not met minimum standards, you need to either revisit your standards, investigate your model, or the quality and quantity of your data.

Salesforce does not assist in directly providing testing criteria for your project but what it does offer is tried and validated uses cases that are currently in production as well as tools that can assess your readiness, so your chances of success are very high.

Change Management and Feedback loops You cannot underestimate the importance of defining exactly how users will be introduced to AI features, manage their expectations, and talk

about how they will be able to provide feedback for continual improvement. Minimizing the importance of this component will likely cause the downfall of any project. Salesforce in particular doesn't help much towards effective change management but innovative user interfaces can assist in acceptance and understanding of AI generated feedback.

In Summary

If you are currently using Salesforce but have not yet looked at the opportunities available for using AI in your organization, then you should certainly consider looking at the tools and features available to you. Salesforce's user-friendly AI tools empower organizations to leverage AI without the need for extensive technical expertise, making the technology accessible to a broader audience.

The use of AI is going to become an obvious component of all CIO's Innovation and Transformation plans. From enhancing customer experiences and optimizing business processes to driving data-driven decision-making, Salesforce AI aligns seamlessly with overarching organizational goals. CIO's can spearhead transformative initiatives that not only introduce their organizations to the world of AI but also deliver tangible, strategic advantages and position their companies at the forefront of technological innovation.

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