



SALESFORCE SERVICE CLOUD EINSTEIN

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The rise of large language models (LLMs) and conversational and generative artificial intelligence (AI) have raised the visibility of AI's potential to transform customer service and support operations. AI can increase customer satisfaction while driving service team efficiency. In analyzing the experience of Salesforce Service Cloud Einstein and Field Service customers, Valoir found many were achieving benefits from AI and automation today while preparing for even greater benefit from Einstein GPT for Service.

The arrival of generative AI and the announcement of Salesforce Einstein GPT for Service has raised awareness of the opportunities to drive improved service efficiency *and* customer outcomes with AI. Although generative AI is relatively new, AI and automation are not: Salesforce Service Cloud Einstein was released in 2016, and has 10 features purpose-built for service that are generally available today. Many organizations have been taking advantage of those capabilities for years to deliver better customer experiences, drive process and service efficiencies, and gather more and better data.

In Valoir's recent study, *Assessing the Value of AI and Automation*, we found that 39 percent of the average customer service agent's repetitive work tasks could potentially be automated by AI, and that automation is already underway in most organizations: the average agent has seen 14 percent of their work automated in the past 2 years. However, service leaders must balance the potential benefits of AI with the potential risks. As such, companies must look to trusted providers to ensure data privacy and security and reduce the risk of adverse outcomes.

Unlike some other "generic" AI models that are built on public data alone, Service Cloud Einstein and Einstein GPT for Service are services grounded in both trusted customer relationship management (CRM) data and third-party data sources. This helps ensure that AI-generated recommendations and content have both a high degree of accuracy and are personalized for a specific customer's situation.

Salesforce also recently announced the Einstein GPT Trust Layer, its approach to delivering AI that organizations can trust, with secure data retrieval, dynamic grounding, data masking, toxicity detection, auditing, and zero retention capabilities.

Salesforce Service Cloud Einstein

Salesforce Service Cloud Einstein extends the capabilities of Service Cloud with conversational AI, analytics, and automation to enable



Thirty-nine percent of the average agent's workday has the potential for AI-driven automation.

service teams to better support customers across their entire journey. Service Cloud Einstein includes:

- Einstein Bots automate the handling of repetitive customer issues and questions.
- Einstein Case Classification automatically suggests values for different Salesforce fields based on closed cases and chat transcripts to accelerate the classification of cases.
- Einstein Case Routing then automatically routes cases to the correct agents based on their case classification.
- Einstein Next Best Actions recommends the next step an agent should take with a particular customer in a particular situation.
- Einstein Article Recommendations recommends specific articles from the Salesforce knowledge base based on the customer interaction.
- Einstein Case Wrap-up suggests field values based on the current case and the answers in previous similar cases to complete the case wrap-up process.

Additional Einstein capabilities are also available in Field Service, including Einstein Predictor (to predict when events, such as no-shows, may happen), and Recommendation Builder (that can recommend parts for a specific job).

Service Cloud Einstein GPT, announced in 2023, takes Service Cloud Einstein capabilities to the next level by adding generative AI outputs to predictive AI including:

- Service Replies automatically generates proposed responses to customers, which agents can then copy and edit or refine before sending.
- Work Summaries streamlines a time-consuming task by automatically writing a work summary based on the details of the conversation.
- Knowledge Articles takes existing information and automatically creates knowledge articles that can be reviewed, edited, and added to an organization's knowledge base.
- Search Answers generates answers to agent searches(via Global Search) and customer questions entered in the self-service search page based on documents in an organization's knowledge base.

Additionally, Field Service GPT includes mobile work briefings to prepare teams with a summary of the information needed for an appointment, on-site knowledge search to provide technicians with relevant information, and post-work summarization to automate the drafting of service appointment reports.

While customers pilot and adopt Einstein GPT for Service, Valoir analyzed the experiences of a number of Service Cloud Einstein

customers to understand both the benefits from existing Salesforce AI capabilities and the best practices companies can undertake today to maximize the potential benefits from their ongoing investments in AI for customer service.

Key benefits

Valoir found customer achieved five main benefits from Service Cloud Einstein: increased customer satisfaction, increased efficiency, improved data capture, accelerated time to productivity for agents, and improved input for product and service development.

INCREASED CUSTOMER SATISFACTION

Valoir found that Service Cloud Einstein customers were able to increase customer satisfaction in three main areas:

- By automating and enhancing self-service capabilities, they were able to enable more customers to find answers to questions and get their service issues resolved without needing to contact an agent.
- By providing intelligent assistance to agents interacting with customers, agents were able to solve customer issues faster and spend more time on complex cases.
- By automating manual processes, organizations were able to reduce the time spent on repetitive work, freeing up agents' time to spend more time interacting with customers.

Customers said:

We started looking at what the future looks like. If Amazon came in [as a competitor], what would keep us relevant? High touch and high customization and communicating in a modern way.

We've been able to move from a product-focused support operation to one that puts the customer first.

In many cases, Service Cloud Einstein was part of a broader business transformation that enabled users to provide their customers with greater visibility, faster issue resolution, and more personalized service than would have been possible before Einstein.

INCREASED EFFICIENCY AND PRODUCTIVITY

Valoir found that increased efficiency and productivity driven by Service Cloud Einstein enabled customers to do more with fewer resources and focus their efforts on improving the quality of interactions instead of internal processes. Customers said:

Before Einstein, agents were using templated responses for replies, but they had to look for them and know what they were called. Now an



Service Cloud Einstein customers were able to automate many manual processes by 50 to 90 percent, driving increased agent productivity and the ability to support new business models.

agent talks to a customer [on messaging channels] and as the conversation evolves, the AI will recommend responses and they can take the verbiage or edit it before they post. This shaves minutes off every response, particularly for newer agents.

We're able to support new lines of business and growth with the same number of agents.

Before we had to complete a permitting process to deliver to a customer and needed people just to process permits. With automation we've been able to save 25 to 75 percent of the time and effort.

Before case classification, we used to come up with lists of keywords we think were related to an incident and someone would sit there and try to categorize each thing. It just wasn't possible to do at scale.

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IMPROVED DATA CAPTURE

Obviously, the key to effective AI is data, and with Service Cloud Einstein, it's self fulfilling: the more quality data that is captured, the more can be used to ground AI-generated results, producing better outcomes for customers and agents. Customers using multiple clouds benefit from rich data from across the entire Customer 360 to help train the AI model and support hyper-personalization.

Additionally, Valoir found that Service Cloud Einstein capabilities such as Case Classification and Wrap-up enabled customers to capture more data on each customer interaction while increasing the consistency and reliability of that data for better analysis and decision making.

Customers said:

We've automated case tags with pull-down lists and now agents can close a case with a single button.

With Einstein automation, agents don't have to fill out the same information twice. Where we were getting some data before, we're getting 20 percent more now. However, we are also collecting data where we had nothing before.

Valoir found that companies deploying Service Cloud Einstein could increase data capture by 30 to 40 percent while improving data quality.

REDUCED TRAINING TIME AND TIME TO PRODUCTIVITY

A number of customers Valoir interviewed cited labor constraints – and, in particular, lack of employees with specific skills or experience, such as service coordinators, as a challenge. However, the intelligent assistance and automation capabilities of Service Cloud Einstein enabled them to



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reduce the time and training required for agents to ramp up to full productivity. Customers said:

We hire seasonal agents, and before Einstein training time was six weeks. We've cut that time in half.

We've been able to take the work from highly paid analysts and turn it over to any user on the service team.

We found that Service Cloud Einstein customers were able to reduce agent training time by an average of 30 percent while enabling less-experienced employees to take on more complex work.

IMPROVED INPUT FOR PRODUCT AND SERVICE IMPROVEMENTS

Beyond improvements in effectiveness and efficiency, Service Cloud Einstein helps organizations capture and analyze data to deliver insights that help teams drive product and service improvements. Customers said:

We're looking to improve our overall business performance. We're collecting two-thirds more data and it's more structured, reliable, and consistent, and we're using it to help product teams prioritize certain projects.

We've taken the conversations out of 'well, I reckon' to knowing what branches actually have capabilities and what's happening in the field.

This gives service teams a bigger seat at the table, providing data-driven insights that improve product quality and reduce the need for product-related service issues in the first place. It is also helping organizations move to a more customer-focused approach with service as a business driver.

Best practices

Valoir found that customers were best positioned to maximize value from Service Cloud Einstein when they followed a few best practices including:

- Getting their data in order. Because Einstein and Einstein GPT's AI are based on a customer's trusted CRM data, external data sources, and knowledge base, the quality and reliability of what is generated depends on both the volume and quality of data. Putting data hygiene efforts in place will ensure Einstein training is possible and effective.
- Identifying automation opportunities. Service leaders can take advantage of existing Einstein capabilities and identify opportunities that are ripe for automation today. They can benefit from those automations while gaining more experience



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with AI and capturing more complete data to better prepare them for Einstein GPT. For example, they can use Einstein to identify top reasons for customer cases and use that insight to update or edit reply recommendations, or create new knowledge articles.

- Shifting their training strategy. To fully benefit from AI, organizations need to shift from product and service knowledge training to training on how to leverage AI as a service assistant.
- Treating AI as an assistant, not a replacement. As with any technology, ensuring effective adoption will be critical for success. Agents that see AI not as a potential replacement, but as a way to augment their efforts and reduce unnecessary repetitive work so they can focus on being customer and brand advocates, will be more likely to get on board and drive maximum value from the technology.
- Continue to evaluate and evolve. The AI space is developing very rapidly, and the scope of its potential benefit in customer service is as well. Service leaders should expect that and build an adoption roadmap with flexibility. They should also take advantage of ongoing training from Trailhead and in-person Salesforce events and community meetings, and conversations with their peers, to understand how others are successfully adopting and managing the risks and potential benefits of AI.

Looking ahead

Given the potential benefits for AI-driven automation in customer service, it behooves service leaders to explore how they can enable both agents and managers with AI capabilities. As Valoir found in its analysis of Service Cloud Einstein customers, the benefits from AI go beyond just reducing case handling time or redeploying headcount: Leaders can leverage AI to make service a differentiator, increasing efficiency and productivity while improving both the customer and agent experience.

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