



Enhancing Customer Relationship Management with Salesforce Einstein GPT

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Abstract

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<p>This report is a research-based thesis that aims to study the importance of AI in Customer Relationship Management (CRM) and how Einstein GPT from the Salesforce CRM Platform helps companies enhance their customer relationship management with their customers. The research will examine how to enhance Customer Relationship Management with Salesforce Einstein GPT. Einstein GPT is a powerful AI tool from Salesforce that combines public and private AI models with CRM data. The thesis will examine how AI (Artificial Intelligence) has been used by companies to provide better customer experience with the help of Salesforce Einstein GPT.</p> <p>The research is conducted with a qualitative approach and the research methods are literature review and case studies.</p> <p>The report consists of an introduction where the information about the research topic, the purpose of the thesis, its objectives, research questions, research method, and structure are presented. In the second chapter, the theoretical framework is discussed wherein AI, CRM, and the use of AI in CRM are presented. After this, in the third chapter, the two chosen case studies are analyzed. The case study chosen for this research study is Spotify and KONE. The case study was analyzed to investigate how these companies benefited by using Salesforce Einstein. In the last chapter, the research questions are answered in the form of results.</p> <p>The results of the thesis will demonstrate how AI is being utilized in Customer Relationship Management. The research will also show how AI is used in all the areas offered by CRM (Customer 360) with significant benefits to users like personalizing Customer Experience, Predictive Analytics, and Optimising Sales Processes.</p>
Keywords Salesforce, CRM, Artificial Intelligence, Einstein GPT

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1 Introduction

This is a research-based thesis. It aims to explore Salesforce Einstein GPT and its uses and how AI is been used in managing customer relationships. This study will be achieved by gathering different sources and findings.

1.1 Terms and Abbreviations

AI	Artificial Intelligence
AGI	Artificial General Intelligence
CDP	Customer Data Platform
CRM	Customer Relationship Management
GPT	Generative Pre-trained Transformer
ML	Machine Learning
NLP	Natural Language Processing

1.2 Introduction to the Study

The thesis topic is about Artificial Intelligence (AI), Customer Relationship Management (CRM), and the Salesforce CRM platform. The research will investigate how CRM processes and experience are enhanced by using the Salesforce AI tool called Einstein GPT. Einstein GPT is a powerful AI tool that combines public and private AI models with CRM data. The thesis will examine how AI has been used by companies to provide better customer experience with the help of Salesforce Einstein GPT.

Salesforce is an American cloud-based software company headquartered in San Francisco, California. It provides customer relationship management software and applications focused on sales, customer service, marketing automation, e-commerce, analytics, and application development. Salesforce was founded by former Oracle executive Marc Benioff in February 1999. (Wikipedia org, Salesforce.)

Now talking about AI, it is now a familiar term for every person. Artificial intelligence is the intelligence of machines or software, as opposed to the intelligence of humans and animals. (Wikipedia

org, AI). This study will show how the AI tool can enhance CRM. The research will also explain the relationship between AI and CRM tool and how it is helpful.

Salesforce is the global leader in CRM. Salesforce introduced the world's first generative AI CRM technology which delivers AI-created content across all the areas of CRM. With Einstein GPT, Salesforce can transform every customer experience with generative AI (Generative AI is a type of artificial intelligence technology that can provide various types of content, including text, images, audio, and synthetic data. Definition by George Lawton in TechTarget Enterprise AI). For example, Einstein GPT can generate personalized emails for the salesperson to send to their customers. It also helps businesses tailor their marketing campaigns and product recommendations. It also helps in providing future trends whether it is forecasting sales or recognizing marketing opportunities. Integrating AI with CRM also fosters optimizing sales processes. 75% of the users are looking to automate tasks at their work and use generative AI for work communications. 38% of the users use generative AI for fun. 34% of the users use it for learning.

Integrating Artificial Intelligence into Customer Relationship Management is revolutionary. As companies want to offer a personalized experience to their customers, the collaboration between AI and CRM emerges as a game-changer. Implementing Salesforce AI tools can help the sales team identify and target potential customers more effectively, manage the sales pipeline, log sales activity, and store contact data.

1.3 Purpose of the Research and Its Objectives

The goal of the research-based thesis is to comprehensively investigate the importance of Salesforce Einstein GPT in CRM. This research area combines the power of Customer Relationship Management (CRM) with the incredible capabilities of Salesforce Einstein and GPT technology. Specific objectives drive this investigation:

- Assess the effectiveness of Salesforce Einstein GPT.
- Evaluate how Salesforce Einstein GPT can improve customer relationship management (CRM) processes.
- Examine the impact on customer satisfaction.
- Investigate how the integration of Einstein GPT affects customer satisfaction, response time, and overall quality of customer interactions.

1.4 Research Questions

This thesis will answer the following questions:

- How do companies benefit from providing the best customer experience by using Einstein GPT?
- How does Einstein GPT assist companies in solving customer support issues in the technology industry?
- What are the key performance metrics and success factors when companies use Einstein GPT to solve problems, and how do they vary across different industries?

1.5 Research Method and Structure

In this thesis, the research method employed is a comprehensive literature review. This method involves a systematic and critical examination of the existing literature, research articles, and studies. The primary objective is to access and analyze the available literature to gain insights, identify knowledge gaps, and draw well-explained conclusions. Through this method, the research aims to contribute to a deep understanding of the subject matter by providing the collective knowledge and findings of experts and scholars in the field.

The thesis consists of four chapters. The first chapter of this thesis is the introduction. It will provide information about the topic followed by the research methodology and the structure used to conduct this thesis.

The second chapter focuses on the literature review, in this chapter, the introduction to AI, its types, its subfields, and its capabilities are explained. In addition to that customer relationship management is explained with its benefits and challenges. Furthermore, the Salesforce (CRM platform) has been described in the chapter and lastly, the use of AI in CRM has been explained. This chapter also explains Salesforce Einstein and its AI capabilities. Providing an in-depth explanation of Salesforce Einstein, its objectives, and its significance and exploring the AI capabilities within Salesforce Einstein, including natural language processing (Natural Language Processing refers to the branch of computer science. It enables machines to understand and respond to text or voice data. IBM.com, topic, natural-language-processing). and GPT. Also, discussed the role of AI, machine learning, and predictive analytics in enhancing customer relationship management within Salesforce.

The third chapter focuses on case studies. The two case studies will be analyzed to get insights.

The fourth chapter will focus on the main goal of the thesis to answer the research questions. In this chapter, the research questions will be elaborated, and clarification of their significance.

Conducting a comprehensive literature review to examine existing research related to each research question. Analyse and synthesize the findings from the literature, emphasizing relevant studies, models, and gaps in the current knowledge. The fourth chapter also covers the conclusion and personal learning.

2 Theoretical Framework

The theoretical framework consists of concepts, analysis, and literature sources. A theoretical framework will have at least two elements, constructs, and relationships among them. To create a theoretical framework 3 main concepts, need to be followed:

- Identifying the key concepts.
- Evaluating and explaining relevant theories.
- Show how the research helps the current business requirements.

This chapter will also discuss the introduction of the Salesforce Platform, the capabilities of AI, and Salesforce Einstein GPT and its capabilities, to solve the research questions. A theoretical framework is a set of concepts, theories, ideas, and assumptions. The key sources for this research will be Salesforce Platform, Salesforce Ben (Salesforce Ben is a community of writers who have something to share about Salesforce), Focus on Force (Focus on Force is a Salesforce learning platform that provides salesforce courses to study), Salesforce Trailhead (Salesforce Learning Platform)

2.1 Artificial Intelligence (AI)

This section describes Artificial intelligence (AI), types of AI, and its capabilities.

2.1.1 Definition of artificial intelligence?

Artificial Intelligence refers to the development done by computer systems that can perform tasks that typically require human intelligence. It includes creating algorithms and models that enable machines to copy functions such as learning, reasoning, problem-solving, and decision-making. AI may also refer to the machines themselves. (Salesforce Ben, Salesforce AI Associate Course.)

AI is categorized into two types:

- **Narrow AI:** Narrow AI is also known as weak AI. It is designed to perform limited tasks. Examples of narrow AI includes voice assistant like Siri and Alexa. (Salesforce Ben, Salesforce AI Associate Course.)
- **General AI:** General AI is also known as strong AI or AGI (Artificial General Intelligence). It is designed to possess the same level of Intelligence and capabilities as a human being. General AI is very vast compared to the other one. However, achieving true general AI is still an ongoing area of research and development. (Salesforce Ben, Salesforce AI Associate Course.)

2.1.2 How does Artificial Intelligence work?

Computers are good at following processes. If the proper sequence of steps is being provided to the computer to perform a task, it should easily be able to complete it. These steps are nothing but the algorithms. (Medium, blog by Chrysalis Software Solutions, Jan 28, 2020.)

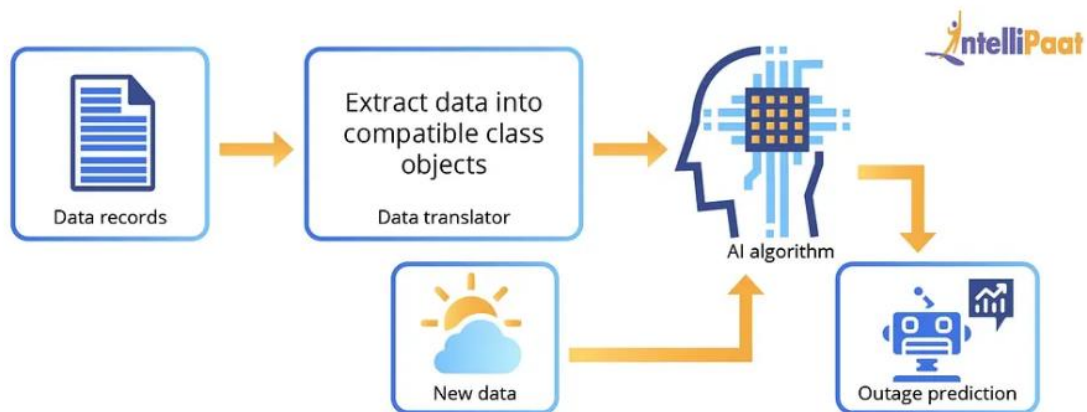


Figure 1: Artificial Intelligence (Medium, blog by Chrysalis Software Solutions, Jan 28, 2020)

2.1.3 What are the major subfields of Artificial Intelligence?

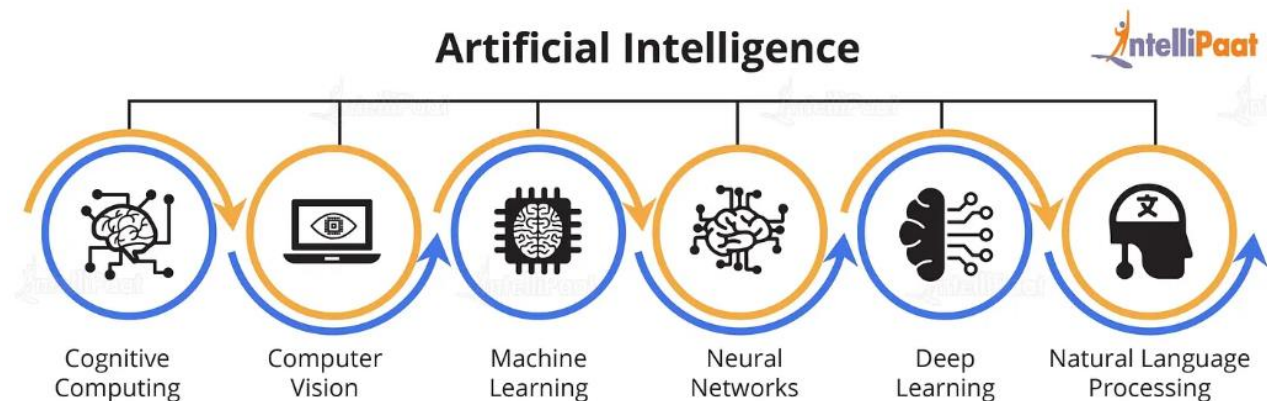


Figure 2: Subfields of Artificial Intelligence (Blog by Chrysalis Software Solutions, Jan 28, 2020, Medium)

AI systems could be built using many techniques, such as machine learning, deep learning, natural language processing (NLP), computer vision, and robotics. Machine learning algorithms allow computers to learn and analyze a large set of data to make predictions or decisions without programming. On the other hand, deep learning algorithms are the subsets of machine learning

algorithms. It uses artificial neural networks to process complex data and extract meaningful patterns. (Medium, blog by Chrysalis Software Solutions, Jan 28, 2020.)

AI applications could be used in many fields like Healthcare, Education, Finance, Transportation, and Entertainment. It helps to perform tasks like automating repetitive tasks, making predictions, enhancing productivity, improving decision-making, and providing personalized experiences. Applications ChatGPT and JasperGPT are examples of narrow AI, and they fall in the category of NLP (Natural Learning Processing). It is designed to generate human-like responses in conversation and assist users with various inquiry tasks. (Medium, blog by Chrysalis Software Solutions, Jan 28, 2020.)

2.1.4 Main Types of AI Capabilities

The following are different capabilities AI can provide:

- **Numeric Predictions:** AI uses large numbers of data to identify patterns and trends that would be difficult for humans to detect. For example, weather forecasting is so accurate, it's all because of the significant improvements made by the AI predictions. AI predictions can be used to answer a wide range of questions, such as whether you are at risk of a medical condition or whether there will be high demand on the power grid. AI predictions are always measured as a value between 0 and 1. AI can also be used to predict numeric values, such as sales, or profit. (Salesforce Ben, Salesforce AI Associate Course.)
- **Classifications:** Classification is one type of supervised learning technique. Classification models predict a class label, such as whether a customer will return a product or not, whether an image is a car or not. AI is very effective at classification tasks. (Salesforce Ben, Salesforce AI Associate Course.)
- **Robotic navigation:** AI does, any task whether it's from autonomous driving to the supply chain. AI-powered robots can be used to perform a wide variety of tasks, from sweeping floors to serving food at restaurants. (Salesforce Ben, Salesforce AI Associate Course.)
- **Language processing:** ChatGPT is the biggest example of natural language processing. It is one of the most capable AIs built to interpret everyday language and act on it in a meaningful way. NLP is a huge part of generative AI, and a subcategory that takes words and can convert them into an image, sound, or other words. (Salesforce Ben, Salesforce AI Associate Course.)

2.2 Customer Relationship Management (CRM)

This section describes the definition of CRM, its benefits, and its challenges.

2.2.1 Definition of Customer Relationship Management

Customer relationship management is a process in which a business or other organization administers its interactions with customers, typically using data analytics to study large amounts of information. (Wikipedia org, CRM.)

Customer relationship management is a technology used by companies to manage relationships with their potential customers. It helps companies stay connected with their customers, streamline processes, and improve profitability.

The CRM software helps to focus on your organization's relationship with individual people including customers, suppliers, and service users. It also includes finding new customers, growing business, and providing support and additional services. With CRM solutions, the sales and marketing team can track and follow their customers' journey with their business. This will help companies to give a personalized experience to their customers by knowing their preferences, behaviors, and their needs.

CRM software is for everyone, from sales, customer service, marketing, business development, recruiting, and other businesses. CRM software lets you store customer's contact information, identify sales opportunities, and manage marketing campaigns, all in one location and make information visible to everyone in the company who needs it. With visibility and access to the data, it is easy to collaborate and increase productivity. CRM solutions can help companies of all sizes. It is more beneficial to small-scale businesses where teams often need to find ways to do less.

To be customer-centric it is very important to know the customer preferences and context in which they engage with the organizations. Today's CRM is supercharged with integrations that foster collaboration and accessible data under one roof. Companies need to choose the right tools to help their businesses grow faster. The right tools help companies target different audiences, design smart automation, proactively work with customers, and manage relationships. While features vary by department or industry.

2.2.2 Benefits of Customer Relationship Management

Following are a few benefits of Customer Relationship Management.

- **Cross-functional insights and reporting:** Data is very important for growing business in this digital world. The data is available from different sources like social media, Google Analytics, business software applications, and CRM technology. However, this raw data is not of any use until it's been cleaned, sorted, and analyzed. A CRM system can consolidate a comprehensive analysis of your customers' online as well as online data to draw a picture of their needs. When a company maintains clean data, it can use a CRM platform to collate, tabulate, and customize data in a report for different departments' needs. (Salesforce.com, Benefits of CRM.)

- **Actionable Data Dashboards:** In the traditional way, using spreadsheets to manage your customer relationships and importing data manually, figuring out what is important, customer relationship insights, and then creating a graphical way to present the data. CRM does it all for you. Once you invest in the platform, you take all the advantages of CRM benefits. You can set up your customized dashboard (Dashboards is a tool many businesses use to track, analyze, and display data, usually to gain insights into the overall well-being of an organization.) for different departments. Dashboards let users quickly see the data that's most important to their workflows without having to dig, sort, or run the report. (Salesforce.com, Benefits of CRM.)

- **Customer Centric Automation:** All companies want to grow their business and to do so, you need to give a personalized experience to your customers by creating tailored experiences for each of them. This capability is provided by CRM systems. CRM platform can help automate more personalized throughout your journey in managing customer relationships. CRM lets you set up a series of automated emails that speak to that audience specifically and are triggered by specific actions. Which solves all your problems by providing a personal touch to each customer. (Salesforce.com, Benefits of CRM.)

- **Optimized processes:** Automation is an advantage that CRM offers to its customers, and it can be seen throughout the company. For example, consistent, customer-centric interactions across marketing, sales, commerce, and service through personalized automation. The marketing team can spend more time creating campaigns, analyzing data, and testing different strategies based on the analytics. While the sales team can focus on selling the right products to the right customers. Commerce and creating more personalized buying experiences and customer service can help provide the best customer service. (Salesforce.com, Benefits of CRM.)

2.2.3 Challenges of Using Customer Relationship Management

The following are the challenges of using CRM tools:

- **Cost:** CRMs can come with a high cost; it is usually dependent on the number of users per subscription. In addition to that, you also need to pay for outside consultation or hire an in-house administrator. (Pepperland Blog, Pros & Cons of Using CRM, February 08, 2017)
- **Dependent on a proper set-up:** If CRM is not set up properly from the beginning, using it may be difficult. This may lead to a loss of time and effort. (Pepperland Blog, Pros & Cons of Using CRM, February 08, 2017)
- **Focused on the wrong person:** Many CRMs focus on the needs of the sales manager and then on sales reps because sales reps are the ones who actively try to sell and hit quota. (Pepperland Blog, Pros & Cons of Using CRM, February 08, 2017)
- **Burdensome data entry:** Depending upon the CRM you choose, your sales team needs to input data manually. This process could take weeks, months, and sometimes years. Which consumes a lot of time and effort. (Pepperland Blog, Pros & Cons of Using CRM, February 08, 2017)

2.3 Salesforce – A CRM Platform

Salesforce is a leader in CRM Platforms, it is known for its robust capabilities and versatility. It was formally known as Force.com. It is a Platform as a Service (PaaS) product that simplifies both the development and deployment process of cloud-based applications and websites. By using this platform developers can make business applications without any dependency on external hardware or software. (S2 Labs, Shrey Sharma, Salesforce environment.)

This platform offers better efficiency by removing any worries related to data maintenance. Salesforce Platform allows businesses to make customized applications according to their needs. As it is cloud-based, it operates on the internet. It also helps to store customer data, including contact information, preferences, and communication history. It offers a wide range of integration, such as REST and SOAP APIs to connect with other systems and data sources. (S2 Labs, Shrey Sharma, Salesforce environment.)

2.3.1 Salesforce Environment

Salesforce Environments are discrete spaces within the Salesforce platform where you can build, test, and deploy the applications. Salesforce provides a wide range of environments for their uses. Following are brief explanations of the main types of Salesforce environments (S2 Labs, Shrey Sharma, Salesforce environment.)

- **Production Environment:** The production Environment is the live environment where the users interact with Salesforce daily. There are active paying users in this environment who access business-critical data. Changes made in the developer or sandbox environments are then deployed in the production environment. (S2 Labs, Shrey Sharma, Salesforce environment.)
- **Developer Environment:** The Developer Environment is used by the developers for creating custom functionalities without affecting the production environment. (S2 Labs, Shrey Sharma, Salesforce environment.)
- **Sandbox Environment:** Sandbox environments are copies of the production environment that are used for testing and development purposes. It allows one to experiment with changes before implementing them in the live environment. The testing is to be done in the sandbox before deployment in the production environment. (S2 Labs, Shrey Sharma, Salesforce environment.)

2.3.2 Salesforce Architecture



Figure 3: Salesforce Architecture model (Sfdc techie, Pavan's blog, August 6, 2017)

Salesforce delivers a highly customized experience to its customers, employees, and partners. As Salesforce is a cloud-based company it offers multi-tenant. The Salesforce platform is the

foundation of the services. It's powered by metadata and made up of different parts, like data services, AI, and APIs for development. Figure 3 illustrates how Salesforce Architecture is built. (Salesforce Architecture, Salesforce Trailhead.)

When you think about the Salesforce architecture, imagine a series of layers that sit on top of each other. (Sfdc techie, Pavan's blog, August 6, 2017).

In Salesforce, these terms are fundamental:

- **Trust:** Trust is the top priority of Salesforce. It's not just keeping sensitive data in the org but also building functionality vital to the company's success on the platform. It keeps your data and functions safe. (Salesforce Architecture, Salesforce Trailhead.)
- **Multitenancy:** Salesforce provides a core set of services to all its customers in the multitenant cloud. It doesn't matter the size of the business you get access to the same computing power, data storage, and core features. Because of the multitenancy, one doesn't need to worry about the installation of new features or the hardware. All this is possible in multi-tenancy. (Salesforce Architecture, Salesforce Trailhead.)

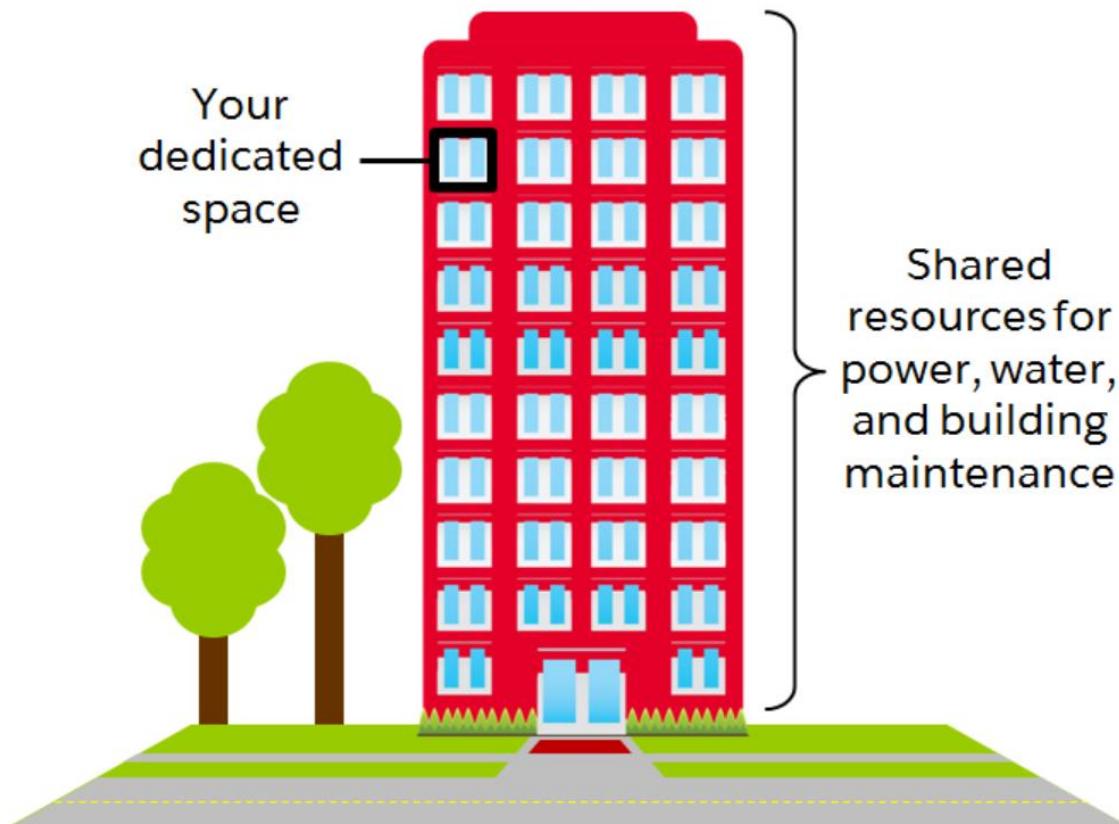


Figure 4, Salesforce Multitenancy (sfdc techie, Pavan's blog, August 6, 2017)

Metadata: Salesforce metadata is the configurations, code, automation logic, and page layouts that define how objects behave and how your org looks. Metadata is the data that describes data, the way that records behave and feel in the Salesforce org. (Salesforce Architecture, Salesforce Trailhead.)

API: API stands for Application Programming Interface. (It is an application programming interface a way for two or more computer programs to communicate with each other. Wikipedia org, API). The Salesforce API allows developers to integrate Salesforce functionalities into other applications and business systems, enabling workflow, automated processes, and greater productivity. The primary value of an API it allows companies to access information or software capabilities from another source. There are different types of APIs like REST API, SOAP API, Bulk API, and Sub API. (These APIs are commonly used in web services, public, private, and composite.) Together they make up the Salesforce data APIs. (Salesforce Architecture, Salesforce Trailhead.)



Figure 5: Customer 360 (Salesforce.com, Benefits of CRM)

Customer 360 is a collection of tools that connect Salesforce apps and create a unified customer profile with one view of the customer. Customer 360 serves beyond the capabilities of traditional customer data platforms (CDP). This unified view of the customer is one of the biggest benefits of a CRM system and it shows all the advantages that become available once you have usable data.

You can also run reports to see your potential leads, where are your opportunities, trends in your sales, and many more. (Salesforce.com, Benefits of CRM.)

There are a few benefits of Customer 360, which are as follows: - (Salesforce blog, September 8, 2022.)

- The sales team can be more efficient.
- The marketing team can be more cost-effective.
- The service teams can provide personalized services.

2.4 Use of AI in CRM

This section focuses on the main purpose of the thesis. How AI is used in CRM. Firstly, by looking at how AI can be used to enhance customer relationship management. Secondly, we will deep dive into Salesforce Einstein. (Salesforce Einstein is an AI tool that combines AI models with CRM), its capabilities, and its ethical considerations.

2.4.1 CRM and Artificial Intelligence

Combining generative AI with CRM allows companies to automate business processes better, develop more personalized communications, and provide customers with the most helpful answers to questions. (CRM Switch, Blog, CRM features by Steve Chipman, published on September 11, 2023.)

With this intelligence, companies can create finely tuned segmentation of leads and contacts to nurture better relationships with prospects and customers. Additionally, AI can help businesses respond faster to customer inquiries and provide more informed answers to requests. (CRM Switch, Blog, CRM features by Steve Chipman, published on September 11, 2023.)

On the sales side, CRM with embedded AI gives users things like: (CRM Switch, Blog, and CRM features by Steve Chipman, published on September 11, 2023.)

- Predictive lead scoring
- More accurate sales forecasts
- Recommendations
- Natural language search
- Data entry automation
- Automatically generated follow-up emails

Intelligent case routing may be a coming AI feature on the customer service side. The goal of artificial intelligence in CRM is to let AI handle the analysis and make intelligent recommendations about a customer or prospect based on all the data about that person the system has collected. (CRM Switch, Blog, CRM features by Steve Chipman, published on September 11, 2023.)

With AI, a salesperson can open a contact record and ask the system for suggestions on how to best connect with that person without spending time sifting through company news and Twitter or LinkedIn profiles. Unlike the generally available ChatGPT, CRM vendors' application of generative AI should be anchored on trusted customer data to guard against abusive use of the technology. (CRM Switch, Blog, CRM features by Steve Chipman, published on September 11, 2023.)

2.4.2 Salesforce Einstein

Salesforce Einstein GPT is a powerful AI tool that combines public and private AI models with CRM. It allows users to ask natural-language questions directly within Salesforce.

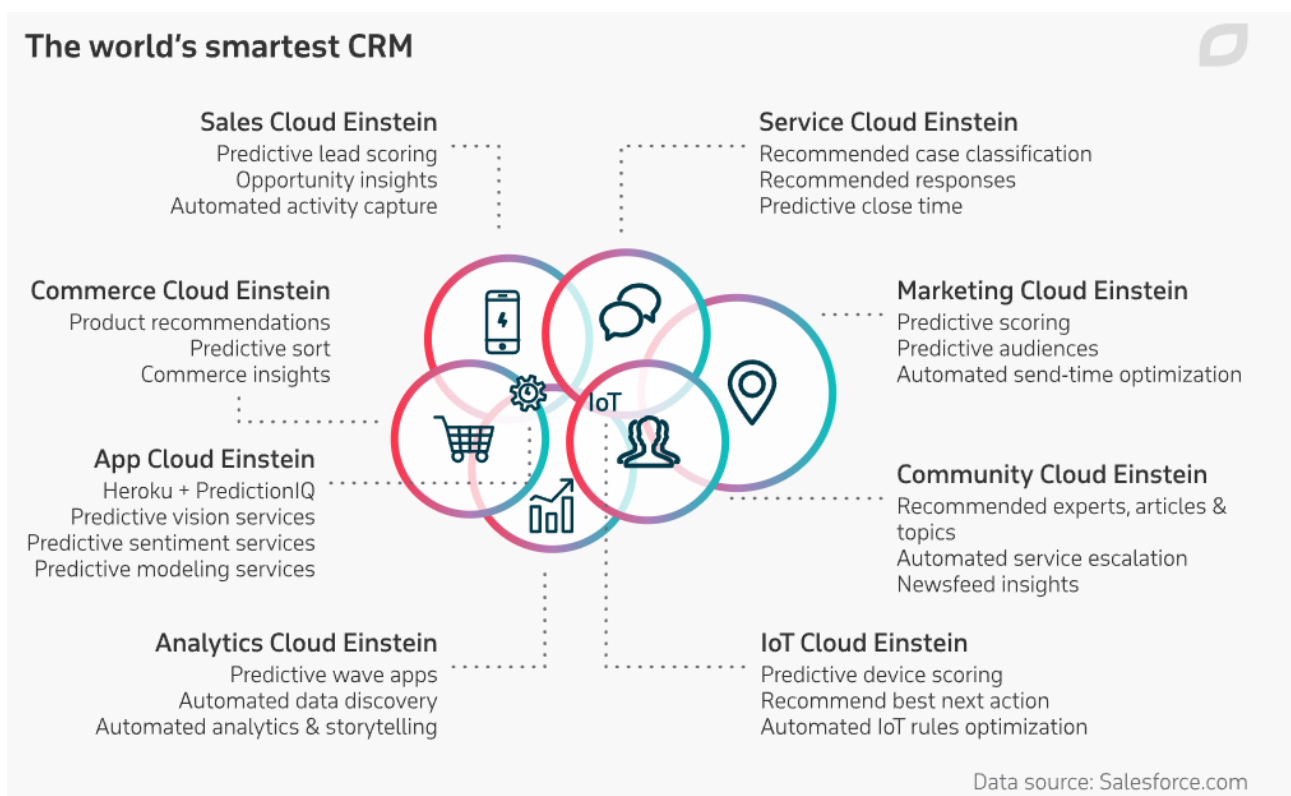


Figure 6: Salesforce Einstein (Itransition, November 27, 2019)

Salesforce Einstein is called the trusted AI assistant for CRM. Einstein AI assistants can perform and automate tasks for any individual or group.

Below are mentioned Einstein's trusted AI Assistants which are viewed in two categories:

a) Einstein Out-of-the-Box Application

Salesforce OOTB means the declarative features provided by Salesforce, where we can develop applications just using button clicks and without any code. For example, workflow, approval process, reports, and dashboards. We can customize many things using the OOTB features of Salesforce CRM. The following are possible with just a click and no programming/coding.

- Customise the layout according to your preference.
- Sales automation
- Email alerts
- Setting up the security level according to the role hierarchy
- Customised reports and dashboards

OOTB functionally means the product capabilities that are available or provided by Salesforce. For example, Salesforce provides a lot of features that are available for the users directly without making any changes. For example, standard objects, standard reports, standard dashboards, standard, and page layouts etc. Which can be directly used without any modifications. (Salesforce Einstein Basics, Salesforce Trailhead.)

Salesforce Einstein OOTB is for all. Below are mentioned:

- **Einstein for Sales:** The main goal of sales is to sell. Sales representatives need to convert their leads and focus on the right opportunities. For them, productivity is an important asset, and productivity increases when they focus on the right direction. (Salesforce Einstein Basics, Salesforce Trailhead.)
- **Einstein for Service:** The core of good customer service is to keep your customer's journey successful from beginning to end. Customer service is more important than the price or quality of the product. You can provide excellent customer service by using AI. It helps you create tailored service suggestions like tailored replies to customers, solve issues faster, etc. (Salesforce Einstein Basics, Salesforce Trailhead.)
- **Einstein for Marketing:** The goal of marketers is to understand their customers better so that they can provide them most effective, personalized campaigns. Marketers need to know which channels customers spend their most time in, how to provide the right content to the right customers, and when to engage them. Einstein for marketing helps marketers analyze past customer behaviors and helps marketers to predict future behavior. (Salesforce Einstein Basics, Salesforce Trailhead.)

- **Einstein for Commerce:** With Einstein for Commerce, you can represent your brand consistently by delivering personalized experiences. You can provide product recommendations, relevant products, etc. It helps increase your revenue by showing shoppers the best products for them. (Salesforce Einstein Basics, Salesforce Trailhead.)

b) Einstein Platform

As every business operates differently, and therefore, Salesforce provides customized powerful tools to their customers. These tools allow admins and developers to build customized smart assistants for their businesses and these assistants could be built by using Natural language understanding, intelligent interpretation, understanding intent, extracting text from imagery, and agency components, to better help businesses interact and understand their customers. Einstein allows all Salesforce users to discover, predict, recommend, automate, and generate.

The Einstein platform allows all admins and developers to build their AI-powered assistants across the salesforce cloud. All Einstein products can build their smart assistants. For example, Einstein Bots, Einstein Prediction Builder, Einstein Next Best Action, Einstein Discovery, and Einstein and Generative AI. (Salesforce Einstein Basics, Salesforce Trailhead.)

Below are the Einstein AI-powered assistants explained briefly:

- **Einstein Bots:** Einstein Bots helps businesses build a smart assistant into the customer's channels like chat, messaging, or voiceover. Einstein bots acts as a smart assistant who assists or answers you on your asked questions. Einstein bots use natural language processing to provide instant help to customers by answering common questions and gathering information to hand off the conversation to the right agent for complex queries. Einstein bots are available on the following salesforce edition; Service-cloud Unlimited edition or digital engagement user licenses. (Salesforce Einstein Basics, Salesforce Trailhead.)

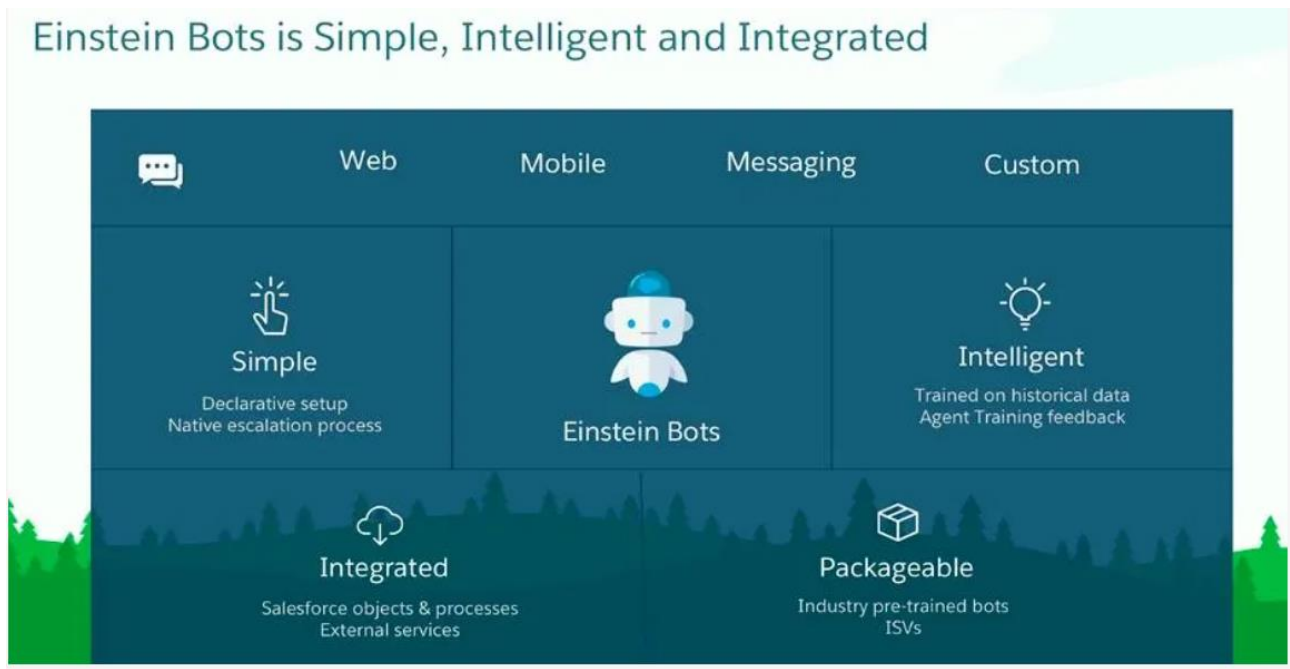


Figure 7: Einstein Bots (Salesforce Trailhead, Salesforce Einstein Basics)

With Einstein Bots, you can create chatbots for your business to immediately answer specific or routine questions for your customers like updating passwords or checking delivery status.

- **Einstein Prediction Builder:** Einstein Prediction Builder helps you to make custom predictions about what will happen next in your business without writing coding. It collects and analyses the historical data to predict the future. Einstein Prediction Builder tool is an easy-to-use tool with advanced features provided by Salesforce. (Einstein Prediction Builder article by Thierry Donneau-Golencer, November 24, 2020.)

Once you decide what you want to predict, the next step is to frame your prediction for Einstein Prediction Builder. Einstein Prediction Builder can handle two types of predictions:

Binary Prediction (answering yes/no questions)

For example, Will a flight arrive on time?

Numeric Prediction (predicting a number)

For what price I can sell my house?

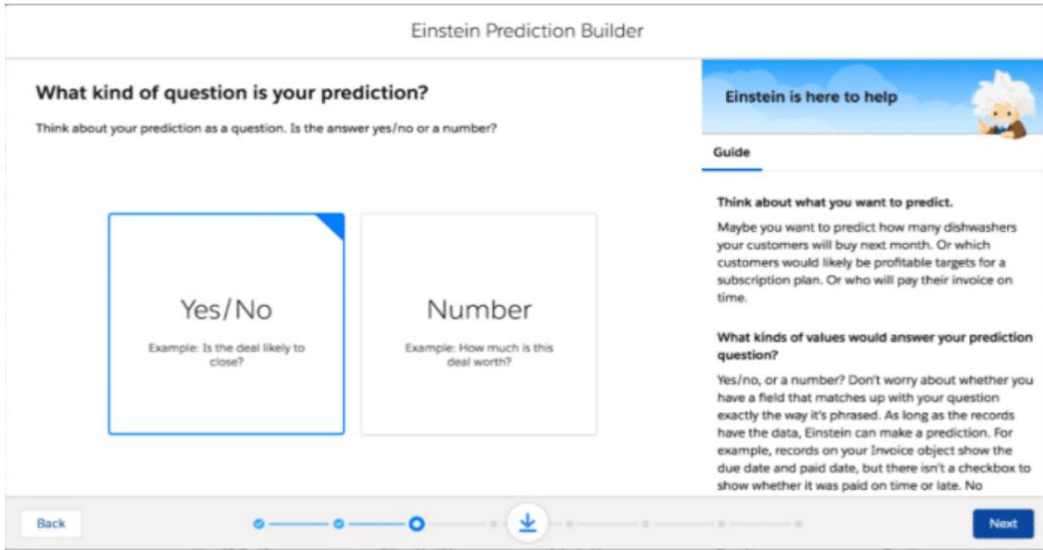


Figure 8: Einstein Prediction Builder (Article by Thierry Donneau-Golencer, November 24, 2020)

- **Einstein Next Best Action:** Einstein NBA is a feature provided by Salesforce to automate business processes. Einstein NBA helps you to create action strategies. It also empowers organizations to deliver personalized recommendations and automate decision-making processes. (Einstein Next Best Action, Salesforce Blog, December 9, 2022.)

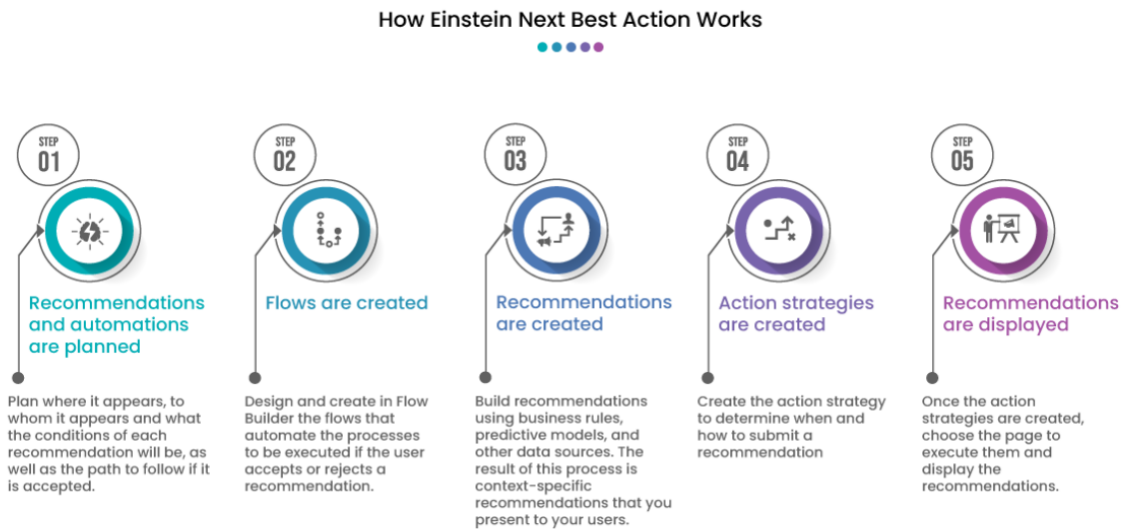


Figure 9: Einstein Next Best Action (Salesforce Blog, December 9, 2022)

- **Einstein Discovery:** Einstein Discovery helps salesforce users identify patterns and dependencies in the collected data. You don't need to build any statistical models to identify, everything is done by Einstein's Discovery. It will analyze the data provided and generate business

stories which consist of charts and descriptions. Like Einstein Prediction Builder, Einstein Discovery also predicts the outcomes without any dependency on data scientists. To get Einstein Discovery you need to buy an additional Salesforce paid license and it's part of the Einstein Analytics package. (Einstein Discovery Quick Look, Salesforce Trailhead.)

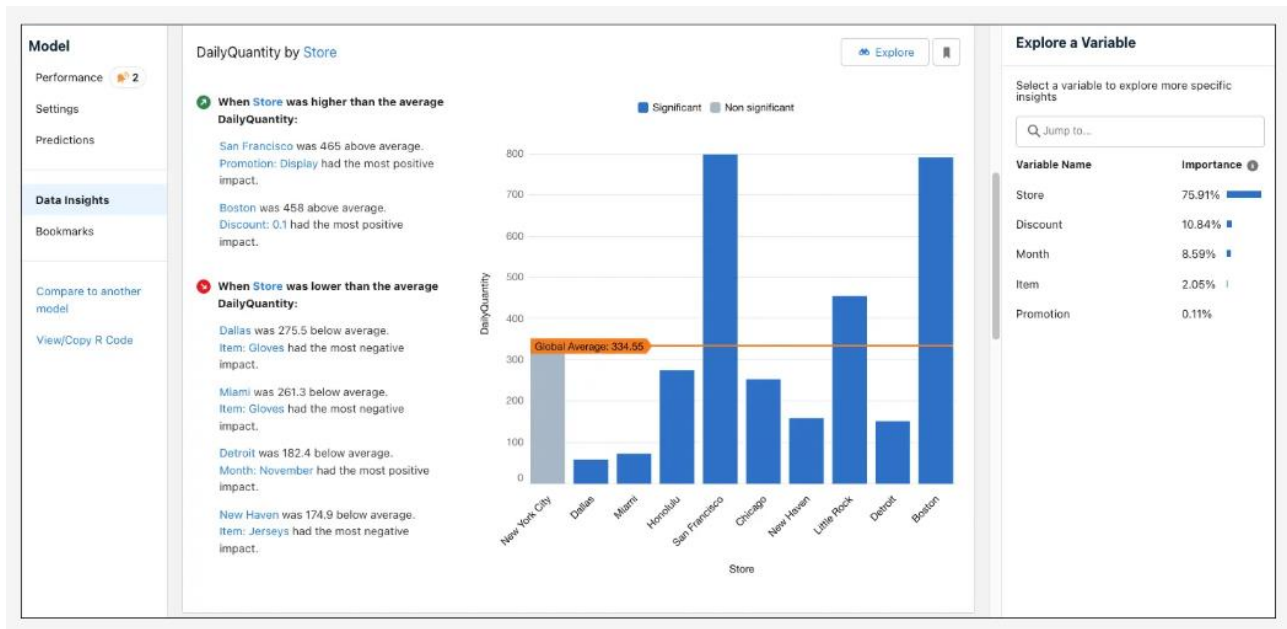


Figure 10: Einstein Discovery Quick Look (Salesforce Trailhead)

- **Einstein and Generative AI:** The latest Salesforce Einstein innovation is Generative AI. The rise of Generative AI has taken businesses to the next level. Generative AI, such as ChatGPT, has been set to transform how organizations and their customers interact, leading to more personalized experiences for all their customers. Using Generative AI with Einstein creates more tailored experiences across the Customer 360. For example, if a Sales representative wants to send an email to one of his customers, Einstein will pull out all the information related to that account and provide you with a well-tailored email by using CRM data. Einstein can automatically provide you with relevant offers and promotion ideas. (Salesforce Einstein Generative AI, Salesforce News & Insights, March 7, 2023.)

2.4.3 Salesforce Einstein Ethical Considerations

In this chapter, Salesforce's Trusted AI principles, the ethical challenges of AI, and the role of AI, machine learning, and predictive analytics will be mentioned to enhance the CRM within Salesforce.

a) Salesforce's Trusted AI Principles

Salesforce has defined five key principles to make sure that AI is developed and used in a trustworthy way.



Figure 11: Salesforce's Trusted AI Principles (Salesforce AI Research Blog)

- **Responsible:** Salesforce uses a wide range of techniques to protect the human rights and data we are entrusted with. For example, they have a dedicated office that is responsible for reviewing and approving AI projects. (Salesforce AI Associate Course, SalesforceBen.)
- **Accountable:** Salesforce itself handles customers' accounts for the responsible use of AI. For example, they have a responsible use policy that all customers need to sign before using any of Salesforce's AI products. (Salesforce AI Associate Course, SalesforceBen.)
- **Transparent:** Salesforce believes in transparency and when it comes to AI, Salesforce is very transparent about how AI systems work. For example, they publish model cards for their AI models, which provide information on how the model and data will be trained. (Salesforce AI Associate Course, SalesforceBen.)

- **Empowered:** Salesforce gives their people the choice to use or not use the AI systems. For example, the Einstein Sales Cloud AI platform includes many features that allow users to control how the AI is used. (Salesforce AI Associate Course, SalesforceBen.)
- **Inclusive:** Salesforce builds AI systems that are fair and unbiased. For example, they use a bunch of techniques to reduce the potential for bias in their models. (Salesforce AI Associate Course, SalesforceBen.)

b) Ethical Challenges of AI

The ethical challenges of AI are complex, and they encompass a wide range of issues that have emerged as AI technologies continue to advance. Some of the key challenges with AI include Lack of transparency, Data privacy, Bias and Fairness, Accountability, Security, and Ethical decision-making. (Salesforce AI Associate Course, SalesforceBen.)

To talk about Lack of transparency, AI algorithms are often called a Black Box, meaning it's difficult to understand how they arrive at specific decisions or predictions. This lack of transparency could lead to a problem in critical applications like healthcare, law enforcement, and Finance. (Salesforce AI Associate Course, SalesforceBen.)

Data protection and privacy is very important. AI systems often require large amounts of data, which includes sensitive or private information. The collection, storage, and use of this data pose significant privacy concerns. (Salesforce AI Associate Course, SalesforceBen.)

Ethical decisions are very critical and crucial as AI is increasingly being used in scenarios where decisions are required such as autonomous vehicles deciding how to act in an emergency. (Salesforce AI Associate Course, SalesforceBen.)

c) The role of AI, machine learning, and predictive analytics in enhancing CRM within Salesforce

AI, machine learning, and predictive analytics play an important role in enhancing customer relationship management within Salesforce the most popular CRM platform. These technologies offer several benefits for companies who are looking to improve their CRM.

Machine learning algorithms can analyze huge amounts of data to extract valuable information related to customers. These insights help businesses to understand their customer needs, preferences, and behaviors. On the other hand, Predictive analytics help to forecast customer behavior and

help businesses make personalized product recommendations to their customers. AI and machine learning can automatically score and qualify leads from historical data, which helps sales teams prioritize their efforts on potential leads. Predictive analysis helps in sales forecasting by providing accurate sales forecasts from past sales data and identifying patterns and trends.

AI and predictive analysis can segment customers into distinct groups based on various characteristics, such as behavior, purchase history, etc. This segment helps businesses to create targeted marketing campaigns and deliver personalized content. Natural language processing techniques can be applied to analyze customer feedback, reviews, and social media interactions.

AI can automate routine CRM tasks like, data entry, email responses, lead nurturing, etc which helps the sales team focus on more important tasks. Machine learning models also help in data quality management by identifying duplicates, and data errors, and maintaining a clean and reliable customer database.

Blending AI, machine learning, and predictive analytics into Salesforce CRM empowers organizations to build strong customer relationships, improve customer satisfaction, increase sales, and enhance overall CRM efficiency. However, it is important that to achieve this we also need to ensure ethical, and transparent considerations of AI.

However, AI, machine learning, and predictive analysis continually evolve and advance.

3 Case Studies

With this research method, I will gain more detailed insights by revealing the advantages of how Salesforce Einstein helps companies enhance their CRM. I chose two real-world examples for the case studies. These are Spotify and Kone.

3.1 Case Study - Spotify

Spotify is a Swedish audio streaming and media services provider founded on 23 April 2006 by Daniel EK and Martin Lorentzon. It is one of the largest music streaming services providers, with over 574 million monthly active users, including 226 million paying subscribers, as of September 2023. Spotify offers digital copyright-restricted recorded audio content, including more than 100 million songs and five million podcasts, from record labels and media companies. Users can search for music based on artist, album, or genre, and can create, edit, and share playlists. Spotify is available in most of Europe, as well as South Africa, the Americas, Asia, and Oceania, with a total availability in 184 markets. Its users and subscribers are based largely in the US and Europe. The service is available on most devices, including Windows, macOS, and Linux computers, iOS, and Android smartphones and tablets, and smart home devices such as the Amazon Echo, and Google Nest. (Wikipedia org, Spotify, history.)

The below table shows the accounts and subscriptions of Spotify users: -

Type	Remove ads	Mobile listening	Sound quality	Listen offline	Spotify Connect
Spotify Free	No	Limited (shuffle-only mode)	Up to 160 kbit/s Vorbis or 128 kbit/s Advanced Audio Coding for the web player	No	Limited (Spotify Connect device using the new SDK)
Spotify Premium	Yes	Yes	Up to 320 kbit/s Vorbis or 256 kbit/s AAC for the web player	Yes	Yes
Spotify HiFi (planned) ^[149]	Yes	Yes	Compact Disc Digital Audio quality lossless	Yes	Yes

Figure 12, Spotify accounts, and subscription types (Wikipedia org, Business model)

Now to talk about Spotify's CRM, Spotify's huge success has been driven in large part by their customers building relationships among themselves, sharing favorite songs and artists with their friends, who are also Spotify users. Today Spotify boasts more than 20 million subscribers and over 75 million active users. They have now paid more than \$3 billion in royalties to artists included in their catalog. To keep track of every customer and every song played, Spotify uses Salesforce CRM to handle everything from collaboration to tracking progress against quarterly targets.

Salesforce enables them to manage a growing catalog of tracks that is now in the millions, delivered to listeners in over 15 countries. (Spiceworks community, Spotify's CRM, posted by previous_toolbox_user on August 15th, 2015, at 12:58 AM.)

As Spotify tries to serve the best customer experience to their customers, Spotify plans to boost Spotify Advertising B2B advertising and sales conversions with automation and personalized web content, leading to higher-quality ads for millions of listeners. Spotify is obsessed with creating moments of audio magic, that's why its advertising uses data to pair content users love with what they might be interested in. Spotify is known for matching people to the content they love, whether music, podcasts, or even ads. Behind the scenes, manual sales tasks and a disjointed view of advertisers made it difficult to sell efficiently and grow revenue. With a single source of advertiser data, automated seller activity capture, and real-time collaboration, Spotify Advertising increased sales team productivity by 40% by cutting down on meetings and email traffic. (Salesforce, Customer Stories, and Spotify improved advertising productivity.)

How does Spotify advertising work and why does it matter, for example, the perfect song can set the mood, but the wrong ad can kill it. Yet, when personalization helps millions of listeners discover both new artists and brands, it can amplify customer relationships. With a 360-degree view of its advertising business, Spotify can see how much ad inventory it has left on certain products and who's buying it to serve up the right ads to the right customers at the right time. (Salesforce, Customer Stories, and Spotify improved advertising productivity.)

According to Dan Walsh the global head of Business Strategy and Operations, at Spotify Advertising, "We're using Salesforce to give our advertisers real-time information about the audiences they're reaching" (Dan Walsh, Global Head of Business Strategy & Operations, Spotify Advertising.)

According to him what the difference looked like before Salesforce, Spotify Advertising had highly manual and inefficient processes that impacted its ability to be as customer-centric as possible. Here's how Spotify Advertising is improving those processes to deliver the optimal experience for customers: It previously took months for Spotify Advertising to gather and act on campaign data. Not, Salesforce acts as a single source of truth for Spotify's ad inventory. Executives and ad reps have full visibility of the sales pipeline with dashboards and AI-powered insights from sales cloud Einstein. Opportunity Scoring helps reps sell fast with AI by prioritizing leads based on those most likely to close. Spotify Advertising has increased the number of marketing campaigns it runs each year fivefold simply by automating customer journeys like registration. Spotify Advertising uses a third-party tool to track website visits. With Personalization, visitors see customized buttons and banners based on their previous activity, leading to a 53% increase in click-through rates. A

prospect's level of engagement then determines whether they speak to a sales rep or see self-service options. Spotify teams, external partners, and vendors connect and communicate in one place with Slack. (Slack is a productivity platform for customer 360) This has helped reduce meetings and emails, increasing productivity by 40%. Automated workflows in Slack have also simplified the campaign lifecycle for sales. Now, Slack keeps reps informed on account progress from RFP to payment. (Salesforce, Customer Stories, and Spotify improved advertising productivity.)

With CRM Analytics, (CRM Analytics helps the entire team find important answers and start making data-driven decisions.) Spotify knows which customers are in danger of leaving or decreasing spend. Dashboards help teams monitor and understand account health, revenue performance, and product adoption, among other fields. This way, sales can follow up with customers who need additional help or attention. (Salesforce, Customer Stories, and Spotify improved advertising productivity.)



Figure 13, Spotify ad sales performance is influenced by a multitude of internal and external factors. (Salesforce resources, customer stories, and Spotify improved advertising productivity.)

This is how Spotify enhanced its customer relationship management by using Salesforce Einstein.

3.2 Case Study - KONE

KONE's story began in 1910 When a machine repair shop in Helsinki became known as KONE. More than a century later, KONE enables the smooth flow of millions of people in urban centers across the world. KONE is a global leader in the elevator and escalator industry. It also provides automatic building doors, as well as solutions for maintenance and modernization to add value to buildings throughout their lifecycle. Over the years, KONE has proven its ability to adapt to the challenges of a changing world. KONE is a Global Innovator by earning a reputation. (KONE, Company history.)

KONE has used Salesforce from the year 2006 for their business processes like Customer Service and Sales with the special skills of Cloud services and SaaS. According to the President and CEO, Henrik Ehrnrooth, KONE drives growth, innovation, and proactive service with Salesforce Insights. A trailblazer in human mobility and customer journeys. (Salesforce Reference, itewiki, KONE.)

For the past 11 years, Salesforce has been a partner with KONE through Salesforce Cloud Services. With the urban population growing at a rate of 200,000 per day, KONE is making its systems smarter and more integrated through analytics and AI, to meet the future demand of valuable customers. Its latest plans include the pairing of Salesforce Einstein and IBM Watson IoT to streamline workflow for KONE's equipment service technicians. (Salesforce Reference, itewiki, KONE.)

Sales Cloud automates KONE's workflows for recurring actions, such as contract renewals and management approvals, and provides detailed Insights that help to maximize productivity and productivity. Salesforce is integrated with KONE's CPQ (configure, price, quote) system helping streamline the CPQ process so sales teams can spend more time focusing on their customers. The company uses lightning to build a specialist app called Sales Cockpit. This app provides individual sales plans for every rep, including real-time visibility of their performance against targets – said Kola-Nyström. (Salesforce Reference, itewiki, KONE.)

As mentioned earlier, KONE is also working with Salesforce Einstein and IBM Watson IoT to create a single, end-to-end system for KONE technicians that will detect equipment problems and generate automated work orders within Salesforce. According to them, in future, the combination of Predictive Maintenance Analytics data from IBM Watson IoT and CRM data from Salesforce Einstein Image Recognition, for example, can be used to identify products and parts, check them against current Inventory stocks, and evaluate next steps for replacement or repair, all within a single integrated system. (Salesforce Reference, itewiki, KONE.)

The company also plans to transform its ongoing engagement between the customer and employees. "We're currently piloting Marketing Cloud around customer journeys," said Koskelin. "We're also really excited about the potential for analytics in helping us gain greater Insights into customer behavior." (Salesforce Reference, itewiki, KONE.)

For example, by combining its field service facilities information with customer sales account records, KONE will be able to achieve a 360-degree view of its customers, which will help simplify and accelerate expansion into new areas. "With a single source of information, we can provide customers with a consistent experience, whether they're in Finland or China," said Koskelin. "With Salesforce, we can stay close to our customers as we continue to grow our business." (Salesforce Reference, itewiki, KONE.)

Ehrnrooth notes that KONE's ability to adapt its service offerings to customer needs has never been so profound. "It's hugely exciting," they said. "And that's why we embarked some years ago in our service transformation, to truly show that there is clear differentiation [for the KONE brand]. We can see that, with great insight into individual customer needs, using technologies such as Watson, Einstein, and others, we can deliver a service that meets those needs in a much, much better way — a way that's never been done before." (Salesforce Reference, itewiki, KONE.)

4 Discussion

This chapter shows my analysis, which involves examining the literature on AI, CRM, and the use of AI in CRM. It will show the summary of the results by answering the research questions from ethical viewpoints, conclusions, and my learning during the thesis period.

4.1 Results

The goal of the thesis is to investigate the research questions to give justice to my research topic. The answers to the research questions are as follows:

4.1.1 How do companies benefit from providing the best customer experience by using Einstein GPT?

As mentioned in the previous section, Einstein GPT offers several benefits to companies by providing the best customer experience.

- **Personalized Customer Interactions:** Einstein GPT can generate personalized responses and recommendations based on customer data and interactions. This leads to the growth of the organization by providing the best customer satisfaction and loyalty.
- **Efficient Customer Support:** The companies can use Einstein GPT-powered chatbots and virtual assistants to provide quick and instant responses to their customers. This reduces the response time, improves efficiency, and enables 24/7 support.
- **Streamline Sales and Marketing:** Einstein GPT can analyze historical data and predict future purchasing behaviors. This helps companies to create targeted sales strategies and marketing campaigns which improves the leads conversion and revenue growth.
- **Enhanced Engagement:** Einstein GPT can improve engagement across all channels, such as email marketing, social media, and website interactions, which leads to better customer experience.
- **Improved Data Insights:** Einstein GPT can assist in data analysis by extracting valuable insights from unstructured data sources, helping companies make data-driven decisions that enhance the customer experience.
- **Lead Scoring and Segmentation:** Companies can use Einstein GPT to automate lead scoring and customer segmentation processes, ensuring that the sales and marketing efforts are focused on high-potential prospects.
- **Language Support:** Einstein GPT supports multiple languages and assists companies in providing customer support and content in various languages.
- **Cost Saving:** Through automation and improved efficiency, companies can reduce operating costs with high-quality customer experiences.

- **Ongoing Learning and Adaptation:** Einstein GPT can continuously improve by learning and adapting from customer interactions and feedback, helping companies stay ahead in customer satisfaction.
- **Competitive Advantage:** By manipulating Einstein GPT to provide superior customer experiences, companies can establish a stronger position in the market.

In summary, Einstein GPT can benefit companies by providing the best customer experience by enhancing personalization, efficiency, engagement, and data-driven decision-making. This leads to higher customer satisfaction, an increase in revenue, and a stronger position in the market.

4.1.2 How does Einstein GPT assist companies in solving customer support issues in the technology industry?

Einstein GPT can assist companies in several ways to solve customer support problems like automated ticket routing, Einstein GPT can automatically categorize and route the customer to the right or most appropriate agents or teams based on the inquiry and issues. This will save a lot of time for both, the customer, and the agent. Einstein GPT also helps in instant responses using AI-powered chatbots and virtual assistant, which provides instant answers to the common queries of the customer. This reduces response times and allows customers to get immediate answers to their questions or queries even after working hours.

Einstein GPT also helps in resolving issues faster by understanding and analyzing the context of customer inquiries. Einstein GPT helps teams/agents quickly identify the root cause of the problem and provides the best solutions more efficiently. This leads to faster issue resolution and better customer satisfaction. Einstein GPT can also support in multiple languages, allowing companies to provide customer support to a global and diverse customer base, which enhances customer experience.

As mentioned earlier in the study, Einstein GPT allows hundreds of benefits to your company, as customer-centric functions are changing fast companies need to rely on this kind of product which serves undisputable advantages.

In summary, Einstein GPT assists technology companies in solving customer support issues by offering automation, instant responses, multilingual support, 24/7 support, self-service options, sentiments analysis, continuous learning, scalability, data analysis, cost efficiency, and documentation and compliance, ultimately enhancing the quality of customer support operations and improving the overall customer experience in a rapidly growing industry.

4.1.3 What are the key performance metrics and success factors when companies use Einstein GPT to solve problems, and how do they vary across different industries?

The key performance metrics and success factors when using Einstein GPT, or any similar AI technology, to solve problems can vary depending on the companies and their objectives. However, there are some common key performance metrics and success factors that apply across all industries as follows:

a) Common Key Performance Metrics

- **Customer Satisfaction (CSAT):** Measuring the customer satisfaction of customers who interact with AI-powered solutions. The higher the CSAT score better the solutions are according to the customers.
- **First Contact Resolution:** The percentage of customer issues resolved on the first interaction with AI-powered systems. Higher FCR rates indicate better efficiency and customer satisfaction.
- **Response Time:** The time AI-powered solutions take to solve the issues of their customers. The shorter the time more efficient it is.
- **Automation Rate:** The number of issues and inquiries handled by AI solutions without human intervention. A higher automation rate can reduce operational costs.
- **Conversion Rate:** For the companies who are involved in sales and marketing, tracking the percentage of inquiries or leads generated by AI solutions that are converted into actual sales.
- **Accuracy and Precision:** Measuring the accuracy and precision of AI-generated responses or recommendations. High accuracy and precision are crucial for some industries where misinformation could be costly.

b) Common Success Factor

- **Customer Experience Improvement:** The primary objective is to enhance the customer experience by providing faster, more accurate, and more personalized experiences for each customer.
- **Cost Saving:** By automating routine tasks, the operational cost is reduced, which eventually leads to revenue growth, and it also helps in improving the efficiency of support and service operations.
- **Data Security and Privacy:** The primary concern of the companies is to protect the customer's data. Ensure that the customer's data is handled securely and that the privacy regulations are attached.

- **Adaptability:** The AI's solutions capacity to learn and adapt to changing customer needs and appearing problem-solving scenarios.
- **Integration:** Successful integration of AI solutions with existing systems, such as CRM, and support ticketing systems.

c) Variations Across Different Industries

The specific metrics and success factors vary from industry to industry according to their unique objectives, demands, and challenges. In the retail industry, the crucial factors are the conversion rate and the average order value. Success factors include personalization and inventory management.

In healthcare, accuracy in diagnoses and treatment recommendations is most important. Success factors include patient outcomes and compliance with medical regulations. For Finance, fraud detection, risk assessment, and regulatory compliance are key performance measures. Success factors include reducing financial losses and improving compliance. In Manufacturing, operational efficiency, maintenance, and quality control are essential. Success factors include reducing downtime and increasing product quality.

In E-commerce, conversion rate, and customer lifetime value are the key metrics, and Success factors include improving the online shopping experience and increasing customer loyalty. In travel, booking conversion rate, and customer reviews are very important success factors to stay aligned with their objectives and challenges.

To conclude, the key performance metrics and success factors when using Einstein GPT or similar AI technologies vary depending on the industry, however, they are surrounded by customer satisfaction, work efficiency, and cost savings. Companies usually tailor their key metrics and success factors to stay aligned with their objectives and challenges.

4.2 Conclusion

In conclusion, the integration of Salesforce Einstein with CRM systems presents a significant change in revolutionizing the landscape of managing customer relationships. This thesis has investigated the impact of leveraging AI-driven insights, predictive analytics, and natural language processing offered by Salesforce Einstein GPT. Combining these technologies helps businesses understand their customer's behavior better and what customers want better than ever before. It also lets them create personal experiences and build strong and long-term relationships with their customers.

The fusion of Salesforce Einstein with CRM represents a pivotal advancement in the domain of customer-centric strategies. It also changes the customer's point of view by taking it to the next level of customer experience. It goes beyond just guessing what customers want, it uses smart technology to understand their needs. This combo is not just making CRM better, but it also re-shapes how companies relate to their customers. It helps businesses predict their future goals. They use data to fine-tune their strategies, adapt to what customers want, and keep up with changes in the market. This combo is not just about selling the stuff, but it helps companies improve their customer service, make better products, and even make smarter business decisions. Understanding customers so well leads to new ideas and better products that people want. This mix also helps companies keep getting better in terms of their internal relationships with their co-workers by creating an effective communication channel.

Regarding my opinion of the two cases mentioned in this thesis, they wouldn't have had great success if they hadn't merged AI with CRM, as this decision had significantly helped them in growing their business and enhancing their business operations. However, Salesforce Einstein GPT was newly introduced last year, there aren't more companies that use this technology.

Regarding the cost of implementing Salesforce Einstein, including its GPT capabilities, can vary based on the specific services and features the company chooses to use. Salesforce typically offers various pricing tiers and packages that serve different business needs and sizes. Costs may involve subscription fees, additional charges for certain functionalities or user licenses, and potentially customization or integration expenses based on the complexity of the implementation.

As for security, Salesforce believes in transparency and securing customers, and when it comes to safeguarding data and ensuring robust security it doesn't step back. Their standards are quite high compared to other CRM platforms. They employ encryption, authentication protocols, and other industry standards security practices to protect data stored within the platform. This includes measures to prevent unauthorized access, secure data transmission, and maintain data integrity.

While Salesforce invests heavily in ensuring platform security, the overall security of implementation also depends on how well companies configures and manages its instance, including handling user permissions, access control, and data governance within the platform.

In the end, I would like to conclude that this combo isn't just adding tools. It's a complete makeover for how businesses treat their customers. It's about making every interaction personal and giving their customer a journey, they'll love. It's all about making sure that the customers are happy every step of the journey.

4.3 Personal Learning

- **Personal Growth:** After conducting an extensive literature review, research papers, and articles related to CRM, Salesforce Einstein, and their integrations, I am quite confident about the technology and the platform that I would like to continue my journey in this direction and would like to build my career in Salesforce Einstein. AI is the next thing in CRM which is already there in the form of Salesforce Einstein and I would like to reap the benefit of it. The process of researching and writing a thesis expanded my knowledge base significantly by deep-diving into CRM, Salesforce Einstein GPT, and their integration. Analyzing various perspectives, data and case studies pushed me to think critically. Evaluating the strengths and weaknesses of different approaches enhanced my ability to assess information effectively.
- **Academic Insights:** Conducting a thorough literature review illuminated the existing gaps and areas for further exploration in the field. It provided me with a clear understanding of the trajectory of CRM, AI, and their integration. Crafting a methodology for the thesis deepened my understanding of research methodologies, enabling me to design a structured approach to gather and analyze data effectively.
- **Personal Challenges:** AI and Salesforce Einstein are very vast areas, and the timeline for the thesis completion was a bit challenging to get more detailed facts. In addition to that Salesforce Einstein licenses are very expensive for an individual, and a detailed technical evaluation was not possible for this thesis. Hence, the outcome of this thesis is only based on the resources available publicly over the internet and the knowledge I gained from my Salesforce learnings.
- **Future Perspectives:** Recognizing the potential impact of the thesis findings on actual business practices and customer interactions is motivating. It highlights the importance of continuous innovation in enhancing customer experiences. Understanding the dynamic nature of technology, I realize the need for continuous learning and staying updated with the latest advancements in CRM, AI, and related fields.
- **Final thoughts:** The thesis writing journey has been an enlightening experience, not just academically but also personally. It's not just about the thesis, itself, but the skills, insights, and growth attained along the way. Embracing the challenges and the learning curve, I have emerged with a deep understanding of CRM, AI integration, and the endless possibilities they hold for shaping the future interactions between businesses and customers.

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