



Using Salesforce Einstein AI in the enterprise

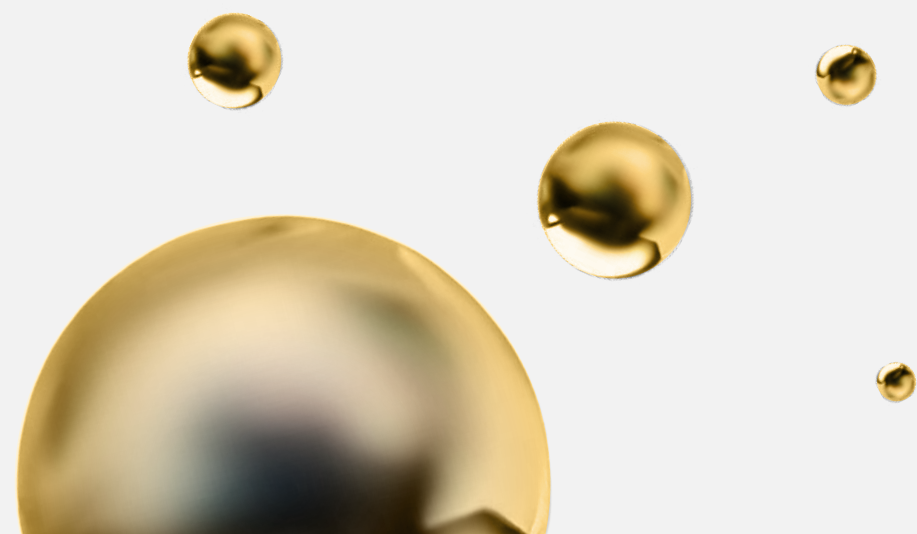
Choosing AI tools for CRM in an evolving landscape

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The pace of AI innovation is booming. **Cloud hyperscalers** offer vast choices for **AI capabilities and are rolling out new features in a steady cadence**. The rapid growth doesn't stop with cloud hyperscalers. Data platform providers are also embedding AI capabilities within their platforms. The CRM space is abuzz with **AI services offered by numerous startups** that are adding AI use-cases and capabilities to their products. Amidst this abundance of choice, enterprises face the challenge of discerning marketing paperware from truly effective products.

Salesforce has released a series of new AI and data capabilities within their platform with a rich roadmap. With so many choices for today's enterprises including cloud hyperscalers, Salesforce applications, and others, the question remains: How do leaders choose the best AI tools for their needs in this rapidly evolving landscape?



Technology Choice Points

The **five** key technology area choice points that today's enterprises are focusing on for AI integration are:

User experience: Integrating AI outputs into existing processes and workflows is paramount. Leaders might ask themselves where they are going to show the output from the AI, and how they are going to augment existing processes and workflows to provide value to their users. The UI must facilitate easy adoption for the user and integrate seamlessly with existing workflows. For example, if a third-party software is used for client calls, call summaries should be readily available within the dialer application but also integrated into Salesforce, ensuring a seamless experience for the user.

Prompt creation: First, consider what data needs to be provided as model input. Important decisions to make include determining where the prompts should be created, and then how additional data can be fed into prompt before sending it to the models.

Model training: Two key questions for enterprises are where to bring together large datasets for model training and how to continually retrain models for optimal performance. This is especially relevant on the predictive side, since model

training requires significant historical data. Organizations can first evaluate whether they have enough computing capacity to train these models, decide how they want to feed their large data sets into the models for training, and then establish a consistent retraining process to improve performance over time.

AI model selection: There are numerous options in today's landscape, and it's crucial for leaders to evaluate which AI model fits their enterprise best. Many are torn between building their own proprietary one, or using existing services from organizations such as Salesforce.

Data convergence: When considering data gravity, enterprises should evaluate where the data to feed into the generative or predictive model resides, and then determine where to converge the data to invoke the models.

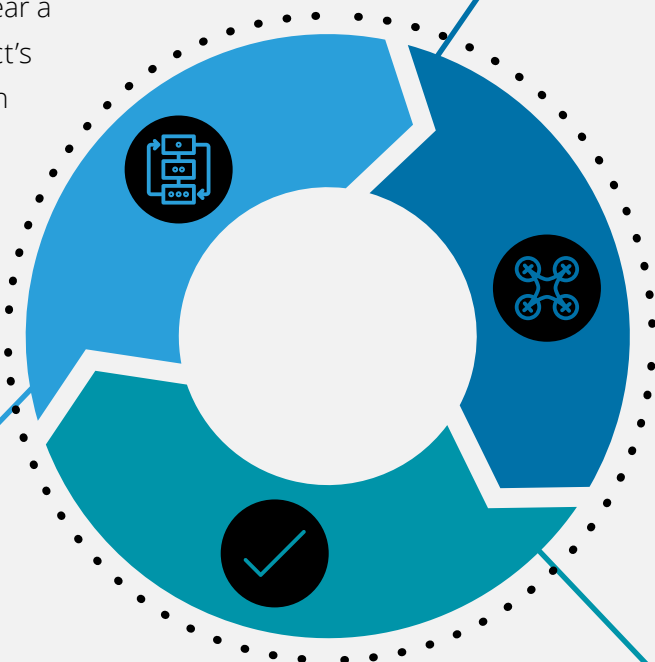


The Non-Negotiables

Even with the wealth of choices at play, there are three non-negotiable factors that enterprises must first establish and adopt to maximize the value of their AI investments.

AI IN THE WORKFLOW

To have the maximum impact, AI should be incorporated into existing workflows and processes rather than create entirely new ones. For example, an AI prediction about a prospect's propensity to buy a particular product should appear alongside the prospect's information within an organization's CRM system.



MODEL FLEXIBILITY

The current “best” AI model for a use case may not stay that way in the future. As international data protection laws evolve and models become newly available across global regions, flexibility in choosing AI models is crucial.

TRUST

It is imperative that enterprise leaders know how their data is managed and stored, and that they understand the legal implications of using generative AI models. Model providers that have first been vetted and approved by the enterprise's legal, cyber, and AI teams should be prioritized.

Making informed decisions

As AI continues to evolve, enterprises must navigate an ever-increasing world of options. Most enterprises have a sense of their high-value use cases and the data they require. However, the advent of cloud hyperscalers and the integration of AI into platforms such as Salesforce present a new set of possibilities. As a result, enterprises need to make strategic decisions to identify the best solutions for their unique needs. Key considerations can include whether to leverage

enterprise custom AI—often utilizing cloud hyperscalers—or to opt for a CRM-specific solution, such as Salesforce Einstein AI.

By carefully evaluating **six** factors, enterprises can make informed decisions that not only maximize the value of their AI investments, but also ensure the best fit for their specific use cases and operational demands.

1

DATA GRAVITY

Enterprises must consider the distribution of their data across systems. The challenge is not simply gathering the data, but in consolidating and validating it from various sources. For example, linking customer IDs across multiple systems can be a daunting task. The reliability of data from different sources must be considered. If the majority of your reliable data resides within Salesforce, for example, it would be logical to use built-in Salesforce Einstein AI capabilities. However, for enterprises with federated data, the choice between Salesforce Einstein AI and enterprise AI capabilities becomes more complex.

2

MAXIMIZE VALUE WITH TAILORED CONTROL

Evaluate your need for control in AI applications. Determine whether your scenario demands high customization to extract maximum value. Traditional approaches that rely on data scientists crafting bespoke models offer extensive control, but pre-built models offer efficiency. For example, Salesforce Einstein AI offers easily pluggable models, enabling swift deployment and immediate value realization.

3

TIME TO VALUE

Time is a strategic asset. Salesforce's packaged solutions for rapid deployment and immediate benefits is one option that today's leaders choose, particularly if speed aligns with their business strategy. Custom-built solutions offer unique tailoring, but can extend the time to operational value.

4

GUARDRAILS, COMPLEXITY, AND COMPLIANCE

Factors such as data, security, regulation, and compliance require careful consideration. Some organizations prefer a customized solution for enhanced control and specific compliance requirements, versus a standard preset solution such as Salesforce.

5

ASSESSING ROADMAP RELIABILITY AND AI SOPHISTICATION

Evaluate the reliability of a software platform's developmental roadmap against your AI needs and timelines. Consider whether your in-house AI initiatives can meet demand without delays, and whether to engineer bespoke solutions or to leverage configurable, ready-to-use AI functionalities such as the ones from Salesforce.

6

AI SOPHISTICATION AND PROPENSITY TO INNOVATE

This involves determining your team's readiness to drive AI innovation and whether they prefer to engineer their own products, or quickly configure and move to the next project. The choice between Salesforce AI and enterprise AI can hinge on these factors, intertwined with your financial decisions and the organization's culture.



Looking ahead

Once you have assessed all possibilities and finalized your decision between enterprise custom AI or Salesforce Einstein AI, it is important to prioritize **four areas** to maximize your investments.



1. INITIATE PILOT AND PROOF PROGRAMS:

Assess the effectiveness of your newly integrated AI. Before launching large-scale projects, it is important to test-and-learn with smaller use cases assessing AI's effectiveness and to ensure your AI program delivers the outcomes you envisioned.

2. DEVELOP A DATA STRATEGY:

Your AI is only as potent as the data it is fed. Generating sales emails without customer-specific data – possibly external data, for example, will result in generic templates. The higher the quality and richness of the input data, the higher the quality of the output. Therefore, having a data strategy that supports your AI roadmap and use cases is crucial.

3. EMBRACE THE PACE OF CHANGE:

AI product capabilities are evolving rapidly. For example, Salesforce now provides AI updates at a much faster pace, meaning the capabilities available today will likely be surpassed in three to six months. To maximize the output from AI, you may need to discard some content or work over time as better product features emerge. Success lies in balancing current needs with future potential.

4. DEVELOP PROMPT ENGINEERS:

It is important to foster your team members' growth into prompt engineers, or to hire externally. It is becoming an expertise all on its own. Extracting value from AI— particularly from Large Language Models (LLMs)—requires robust prompt engineering skills and strategies.

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