



Focus Area #1: Einstein Trust Layer

1. **Dynamic Grounding:** ensures AI responses are contextually accurate by linking prompts to real-time, trusted Salesforce data.
2. **Data Masking:** protects sensitive information by replacing identifiable data with anonymized placeholders during AI processing.
3. **Zero Data Retention:** guarantees that no customer data is stored outside of Salesforce, even when interacting with external AI models.

Swipe for more





Focus Area #2 - Generative AI in CRM Applications

1. **Automated Emails:** draft personalized, context-rich emails based on CRM data to improve outreach and response rates.
2. **Service Replies & Summaries:** generate consistent, accurate responses for customer service and concise summaries for case management.
3. **Application Areas:** integrated into Sales Cloud for lead nurturing and Service Cloud for customer support, enhancing productivity and customer satisfaction.

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Focus Area #3 - Prompt Builder

1. **Prompt Templates:** design reusable, data driven templates to streamline AI interactions across business processes.
2. **Data Leverage:** integrate Salesforce records directly into prompts for tailored, dynamic outputs.
3. **Advanced Configurations:** use Flow Builder and merge fields to create conditional logic, ensuring precise AI behavior.

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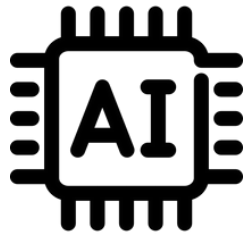


Focus Area #4 - Agentforce Tools

1. **Workflow Automation:** automate repetitive tasks, freeing up time for strategic activities.
2. **Decision Support:** analyze data patterns to provide actionable insights and recommendations in real-time.
3. **Custom Actions:** build tailored AI functions using standard and custom topics, enhancing flexibility within Salesforce workflows.

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Focus Area #5 - Model Builder

1. **Predictive Model Configuration:** create models that forecast outcomes like lead conversions, sales performance, and customer churn.
2. **Bring Your Own Model (BYOLLM):** enables you to add a foundation model hosted on an external platform and connect it with Einstein Studio.
3. **Data Driven Insights:** leverage historical data to uncover trends and support proactive decision-making.
4. **Impact:** empower your business with predictive analytics to make informed, strategic choices.



Hope this was helpful!