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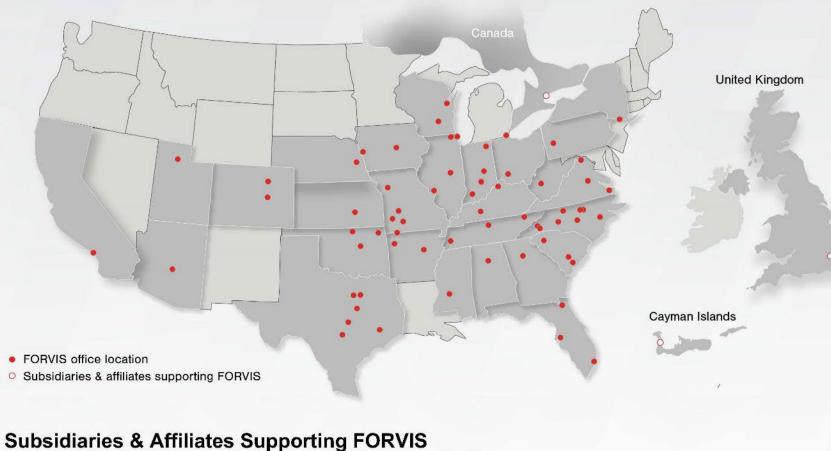
Getting Ahead With Al-Driven CRM Tools



Business Technology Solutions

March 20, 2024

Global Presence & Reach



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Top 10 U.S. Public Accounting Firm *

> 27 States + Canada, U.K., & ** **Cayman Islands**

10+ Industries

68 Markets

500+ Partners & Principals

6,000+ **Team Members**

FORVIS is a member of Praxity™, an international

alliance of independent accounting firms that offers ultinational clients access to resources around

FORVIS Wealth Advisors, LLC

FORVIS Capital Advisors, LLC

- FORVIS Global Advisory Canada ULC**
- TALENT SHIFT, LLC
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Business Technology Solutions

FORVIS provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

PARTNER

sales*f*orce

Microsoft Partner

In addition, our Insights & Automation team provides business intelligence (BI) and robotic process automation (RPA) services. Our Marketing Consulting team provides marketing automation platform and marketing campaign support services.

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Microsoft Partner Soge Partner ORACLE NETSUITE Solution Provider



From sales forecasting to financial reporting, learn what CRM and ERP technologies can do.

Meet the Presenters



Caleb Zautner Lead Consultant – Salesforce

salesforce PARTNER

caleb.zautner@forvis.com



Tom Gioielli

Senior Managing Consultant – Microsoft Dynamics

Microsoft Partner

tom.gioielli@forvis.com



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Getting Ahead With Al-Driven CRM Tools



Business Technology Solutions

March 20, 2024

Agenda

- Introducing the Al-driven CRM tools
- Using AI to help solve sales issues
- Using AI for customer service insights
- Using AI for field service insights
- Additional features & use cases



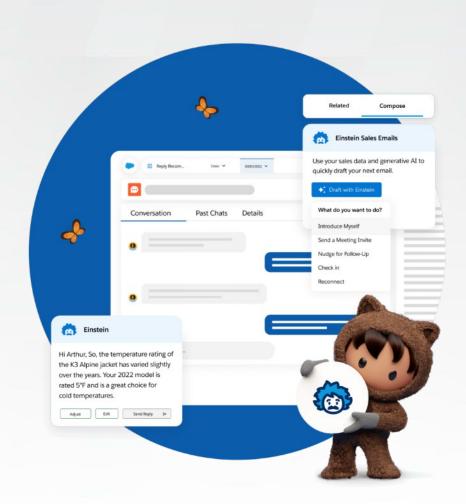
Salesforce Einstein



What is Salesforce Einstein?

"Integrated set of AI technologies that make the Customer Success Platform smarter & brings AI to trailblazers everywhere" – Salesforce

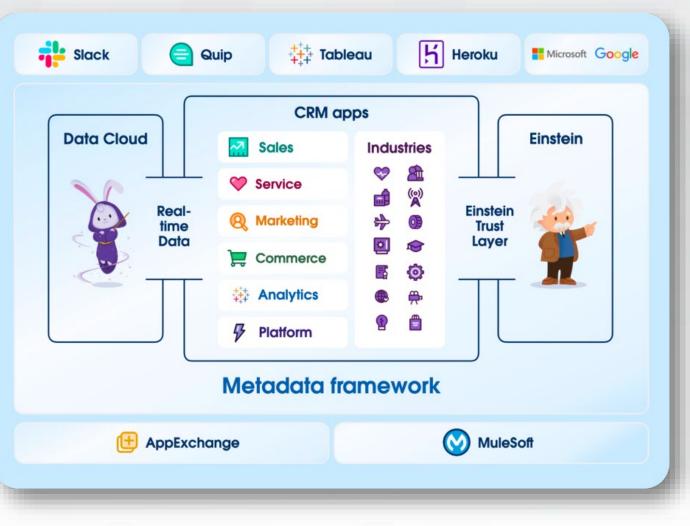
- Robust AI for CRM
- Integrated across Salesforce products



Salesforce Einstein Products

- Einstein for Sales
- Einstein for Service
- Einstein for Marketing
- Einstein for Commerce
- CRM Analytics
- Einstein for Admins & Developers



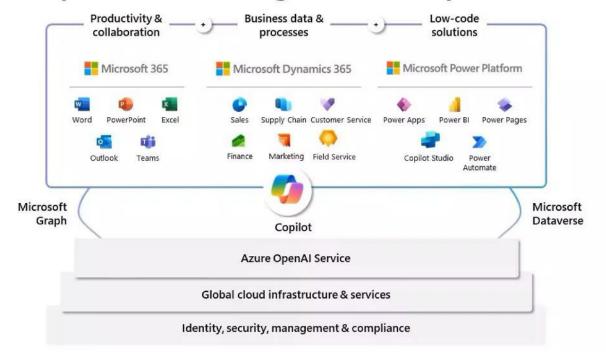


Microsoft Copilot

- Copilot services live as an underpinning to all Microsoft Services
- Capabilities vary by product being used
- Can utilize & access organization specific data

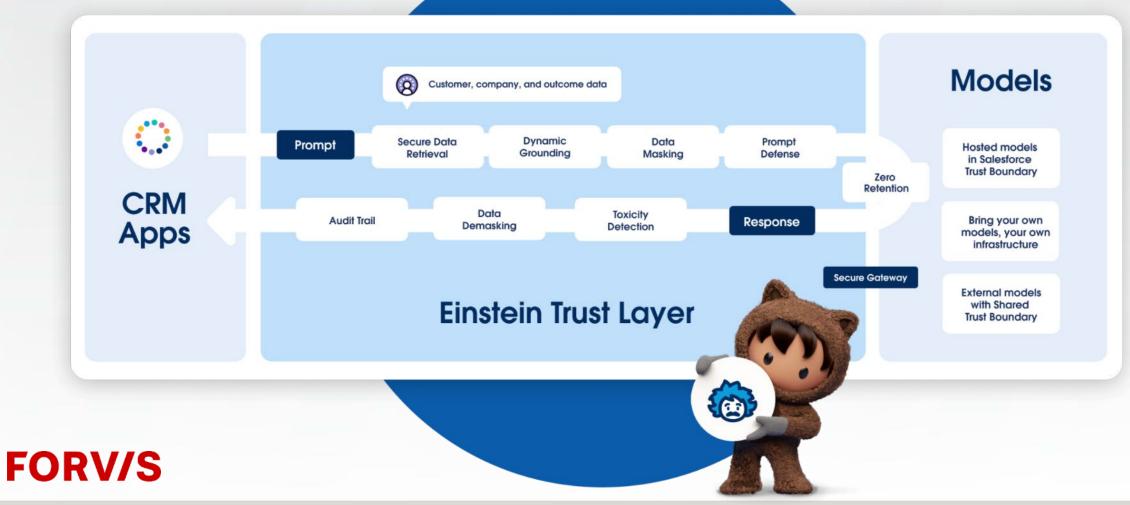
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The blueprint for cross-organization impact



Salesforce Einstein Trust Layer

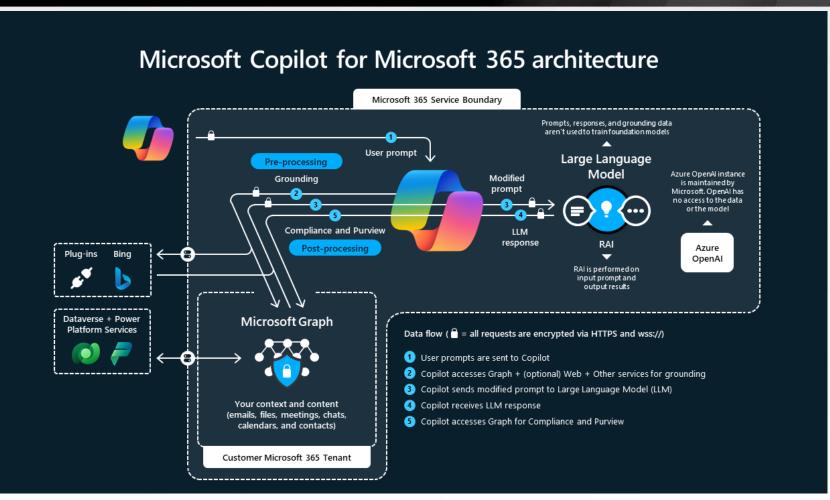




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Trust Layer/Data Retention





Getting Ahead With AI: Solving Sales Issues

- Sales team isn't sure which Opportunity or Lead to pursue first
- Relying too much on "gut feeling" rather than data & trends
- Time is being spent on preparation, such as reading through extensive message history or drafting emails



Einstein Lead Scoring

- Use AI to score your leads by how well they fit your company's successful conversion patterns
- Let your sales team prioritize their leads by Lead Score
- See which fields influence Lead Score most

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Prioritize the leads most likely to convert.

Greg Thomson			+ Follow Convert Edit New Case V
Title Business Development Coordinator		none 15-555-1212	Email greg@bountyplan.com
$\langle \cdot \rangle$	Nurturing	Unqualified	Converted V Mark Status as Complete
ACTIVITY CHATTER	DETAILS NEWS		88 Einstein Score
Lead Owner	Lead Status		
Milton Waddams	Nurturing	X	Top Positives
Name	Phone		Industry is consulting
Greg Thomson	415-555-1212	1	State/Province is PA
Company	Email		Einstein Detected Department is Sales
BountyPlan	greg@bountyplan.co	m /	Annual Revenue is \$100,000
Title	Rating		Lead Source is lead buy
Business Development		1	Send Email
Coordinator			

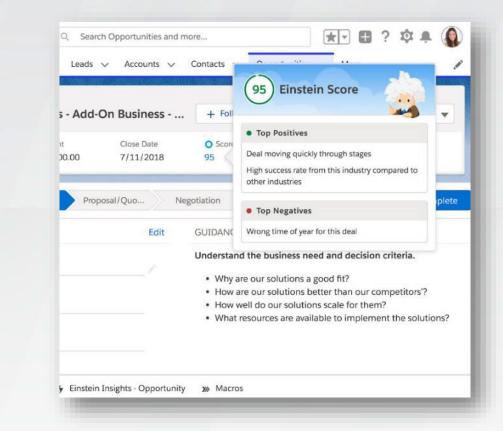




Einstein Opportunity Scoring

- Use AI to score your opportunities
- Each opportunity is given a score from 1 to 99
- Can be used in combination with forecasting, reports, & flows
- Salesforce also tells you the factors that contributed to the score

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Scoring Model

- **Opportunity:** Record Details, History, Related Activities
- **Related Account:** Record Details, Record History
- Related Products, Quotes, & Price Books

Copilot Email Insights

- Suggested email draft available directly in Outlook
- Summarize email chains & add notes to CRM records
- Identify customers & companies through email

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🧔 Copilot

Chat Email (preview)

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Draft with Copilot $_{\odot}$

Write an email to thank Kenny Smith for showing interest in Contoso 3D printers

Dear Kenny Smith,

Thank you for expressing interest in Contoso 3D printers. We appreciate your consideration and are delighted to have the opportunity to assist you.

At Contoso, we pride ourselves on delivering high-quality 3D printers that are designed to meet the needs of our customers. Our printers are known for their reliability, precision, and ease of use. We offer a range of models to suit different budgets and requirements, ensuring that you can find the perfect solution for your business.

Add to email

÷...

Key email info ①

- Kenny Smith inquired about purchasing 10 coffee machines and requested the best price and any available discounts.
 1
- Logan Edwards offered a 10% discount for bulk orders, bringing the total cost for 10 machines to \$900.
- Kenny Smith accepted the offer and requested information on the payment process and estimated delivery time. 3



Copilot Record Summaries

- Uses the CRM Audit history to identify recent changes to the record
- Identifies key fields & metrics that are helpful for the salesperson to know

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Here is the opportunity summary for "5 Café Lite Espresso Machines for A. Datum":

- Microsoft is a new customer.
- We are actively discussing with Heriberto Martin about a new opportunity worth \$50,000.00 for Airpot.
- The deal is at Develop stage and is estimated to close by 10/27/2023.

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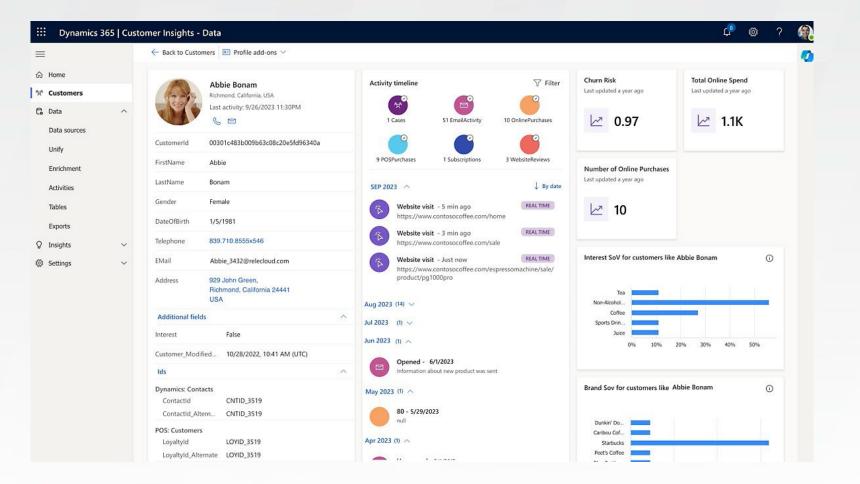
Al-generated content may be incorrect

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Get latest news related to account

Copilot Customer Insights





Getting Ahead With AI: Customer Service Insights

- Customer service is a priority & coaching in real time can be difficult
- Getting customers to the correct queue or service agent requires complex setup & constant tweaking



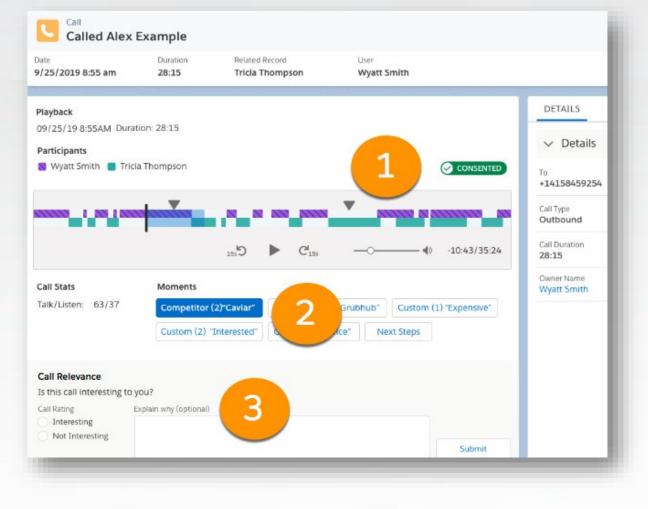
Einstein Conversation Insights

- 1. Different colors show the participants on the call
- 2. Click different mentions to jump to specific areas in the call
- 3. Provide feedback to Salesforce

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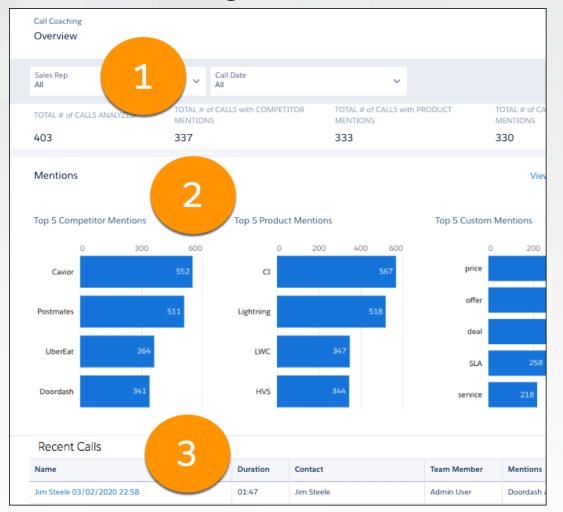
Call Record



Einstein Conversation Insights

- 1. Filter by Rep & Call Date
- 2. Review reports of top mentions
- 3. Links to recordings

Call Coaching: Overview



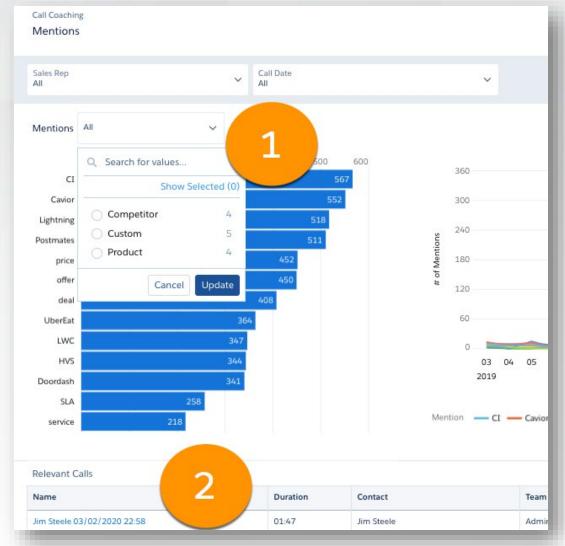


Einstein Conversation Insights

- 1. Filter by mention
- 2. View relevant calls

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Call Coaching: Mentions

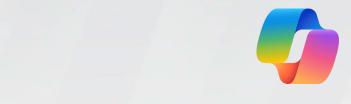


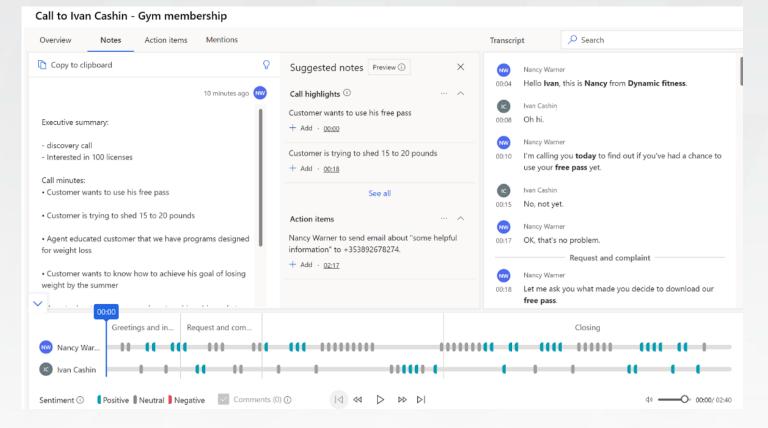


Dynamics Call Insights

- Transcript automatically added to call identifying speakers
- Suggested summary, notes, & action items

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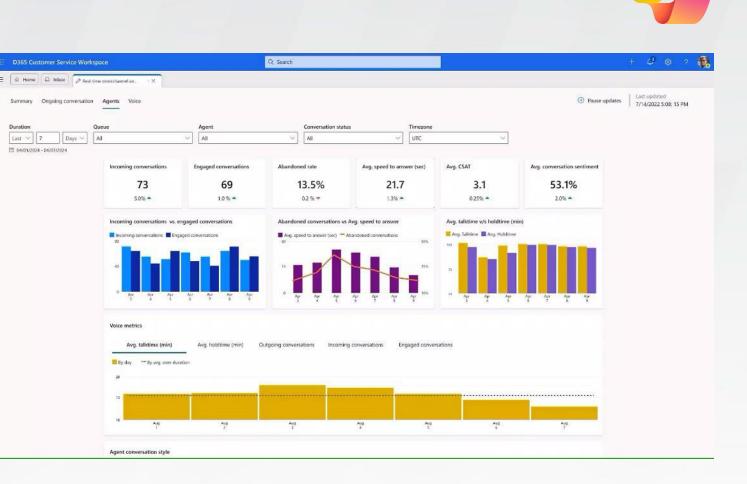




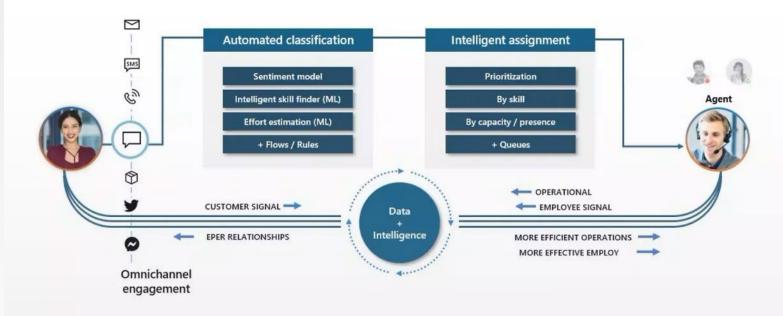
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Dynamics Call Insights

- Sentiment Analysis to determine positive, negative, or neutral statements
- Team & agent metrics to better understand trends



Customer Service Classification & Assignment



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Getting Ahead With AI: Field Service Insights

- Work Orders can be complex with large amounts of data to digest
- It can be challenging for technicians to update bookings in a timely manner on a mobile app
- Creating work orders for customers can be burdensome



Copilot for Field Service

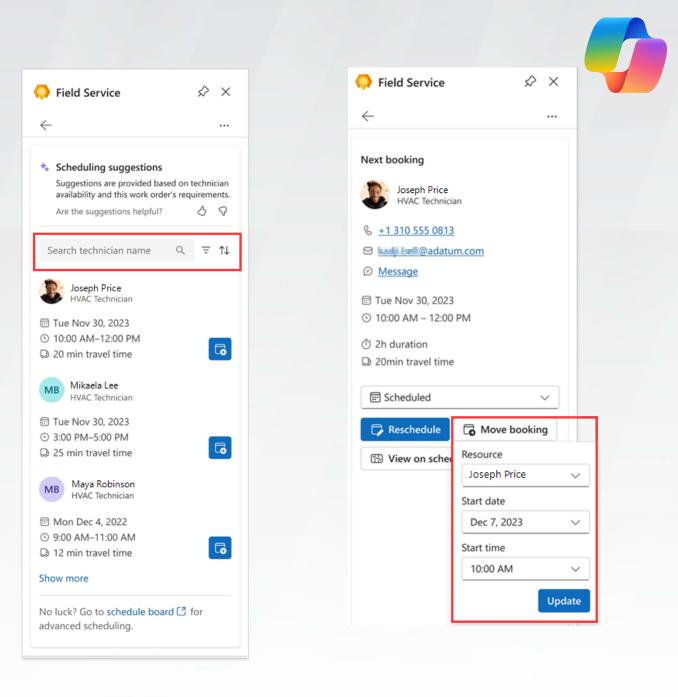
- Copilot in Outlook
- Extract relevant details to create Work Orders based on the text in the email thread

Home

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	Review the work order Please review before saving to en Al-generated content is accurate, and appropriate. Learn more			
	Leave feedback on the content	3 8		
	Create work order			
Field Service	Priority			
	Important	\sim		
	Service account *			
ome Work orders	Contoso Ltd.	\sim		
	Work order type * ①			
	Repair	\sim		
Carilat ()	Incident type ③			
🤣 Copilot 🛈	HVAC repair	~		
treamline work order management in Dynamics	Price list * ①			
365 Field Service.	USD	~		
os neia service.				
Create work order from email	Summary			
cleate work older from email	HVAC is offline; Had strange sounds last week; Need a tech out ASAP, ideally today, since customer is at half capacity, ideally TODAY.			
	Al-generated content may be incorrect			
	Time promised (from)			
	11/30/2023 🗊 - 7:00 AM	٩		
	Time annulation (as)			
	Time promised (to) 11/30/2023	٩		
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Copilot for Field Service

- Find & suggest scheduling options based on the Work Order Requirements
- Move or reschedule bookings directly from Outlook



Copilot for Field Service

- Work Order recap for web users
- Mobile recap for technicians using the Dynamics CRM Field Service mobile app

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Copilot recap PREVIEW ()

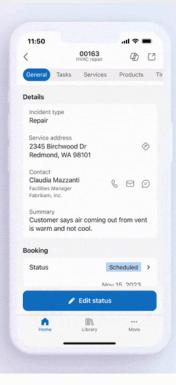
This work order was created on Tue Aug 27 when Mica Pereira reported unusual noise from the <u>HVAC ductwork</u>.

Several notes have been added with photos from the customer showing where the problem is heard. There is also a note from Mona Kane that outlines the suspected cause as the recirculator fan and recommends diagnosis starts there.

Please review before using to ensure this Al-generated content is accurate, complete, and appropriate. <u>Learn more</u> and review the <u>terms</u>.

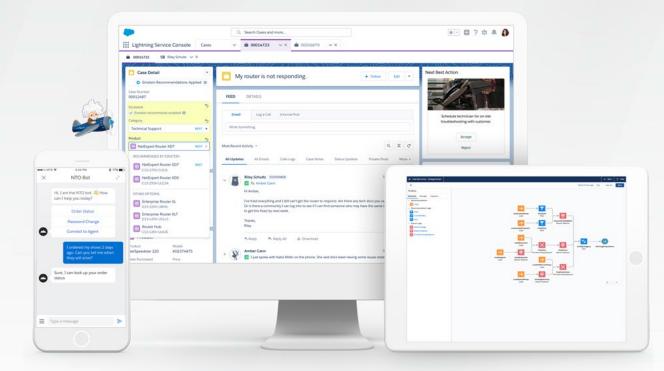
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Regenerate recap



Service Cloud Einstein Features

- Einstein Bots
- Einstein Case Classification
- Einstein Case Wrap-Up
- Einstein Case Routing
- Einstein Article Recommendations
- Einstein Conversation Mining
- Service Analytics
- & More ...



Einstein Bots

- Help resolve support cases faster or prevent cases from being created
- Reduce case duration
- Save service agent time
- Can be trained to understand human language, & respond intelligently through Natural-Language Processing (NLP)

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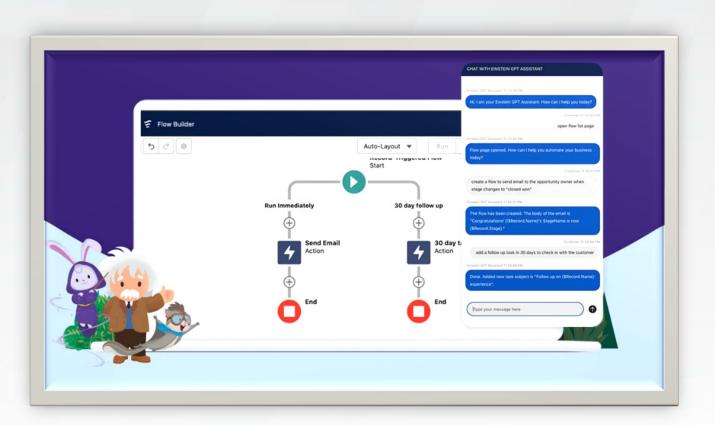
What is a chatbot?

"A computer program that conducts a conversation via auditory or textual methods"



Salesforce Einstein GPT for Flow

- Describe what kind of flow you want to build & have it built for you in near real-time
- Describe a formula you want & Einstein GPT will build it automatically
- See improved searchability by describing a function you need to locate & have Einstein GPT insert the correct flow automatically—instead of seeking out sub-flows & invocable actions

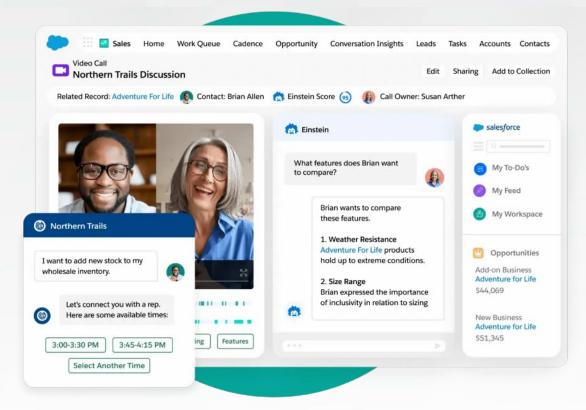




		CHAT WITH EINSTEIN GPT ASSISTANT
P Select Elements 15 C 10	Auto-Lavout View Tests Activate Save As Configure Start	Solve
Select Object Select the object whose records trigger the flow when they're created, upo *Object Opportunity	dated, or deleted.	
Configure Trigger Trigger the Flow When: A record is created A record is updated A record is created or updated A record is deleted		Einstein GPT Assistant 9-38:56 PM
Set Entry Conditions Specify entry conditions to reduce the number of records that trigger the f unnecessary flow executions helps to conserve your org's resources. If you create a flow that's triggered when a record is updated, we recomme is updated to meet the condition requirements option for When to Run to Condition Requirements	and first defining entry conditions. Then select the Only when a record	Hi, Lam your Einstein GPT Assistant. How ca help you today? Customer 9: open flow list (
None		Einstein GPT Assistant 9:39:36 PM Flow page opened. How can I help you auton
* Optimize the Flow for:		your business today?
Fast Field Updates Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.	Actions and Related Records Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.	Customer 9: create a flow to send email to the opportuni owner when stage changes to "closed won"
Include a Run Asynchronously path to access an external system	after the original transaction for the triggering record is successfully committed Cancel Done	Type your message here

Sales Cloud Einstein Features

- Einstein Lead Scoring
- Einstein Opportunity Scoring
- Einstein Opportunity Insights
- Einstein Account Insights
- Einstein Automated Contacts
- Einstein Forecasting
- Einstein Activity Capture
- & More ...



Einstein Deal Insights

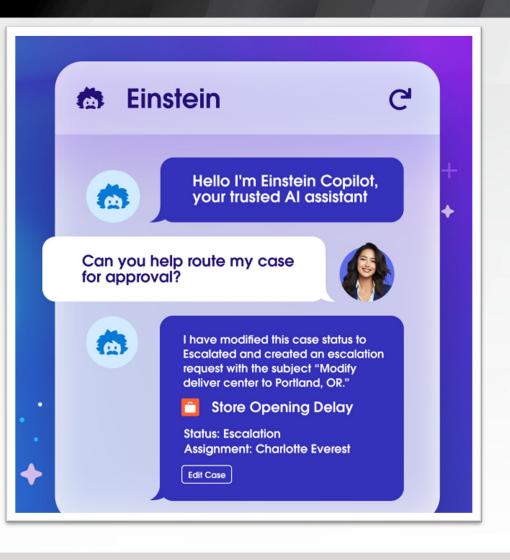
View Insights From Within Your Opportunity Pipeline

- Snapshot of your Opportunity Metrics
- 2. Insights that predict the likelihood your opportunity will close
- 3. Additional account information

Ins	pection Flow								Water Mid ETF
Shov	v opportunities closing	This	s Month 🔻 for	My Team	Q A Y		Last updi	1 3.490	Opportunity Score Days to Close Days in Stage Push Med 7 21 0
	Pipeline Closed Won M \$920K		Commit Forecast \$3.3M	Best Case Forecast \$7.2M	Open Pipeline \$16M	Closed Lost \$1.5M	Moved in @ \$306K	Moved Out @ \$510K	Overview Activity
iter		Name		Date, My Team, Open Pipelin					A Needs Attention
	Name 4		~ R	Opportunity Score V	Amount	✓ Close Date	~	Stage	 Einstein predicts this opportunity is unlikely be won this month.
1	Water Mid ETF	8		Med	\$144,144.00	12/21/2021	88	Negotiation/Review	be won this month.
2	Travelzoo Learning	8	я	Med	\$102,750.00	12/7/2021		Value Proposition	S Opportunity Amount has recently
3	Townson Inc Services	8	R	High	\$305,900.00	12/31/2021		Perception Analy	decreased 5 times.
4	Threshold IXYS Ltd.	8	P	Med	\$13,716.00	12/22/2021		Negotiation/Review	
5	Territorial Tarena Tech		P	Med	\$990.00	12/24/2021	88	Needs Analysis	Other Insights
6	Sunergy Summit		A	High	\$306,087.00	12/30/2021		Qualification	> (a) Company is expanding
7	Sporting EnerNOC Ph		A	High	\$6,877.00	12/24/2021	88	Qualification	
8	Shutterfly NETGEAR I		A	Med	\$86,991.00	12/28/2021		Prospecting	
9	Shire EDAP	8		High	\$350,811.00	12/21/2021	88	Needs Analysis	
	Seed Gold Corp		R	Low	\$143,000.00	12/8/2021		Qualification	

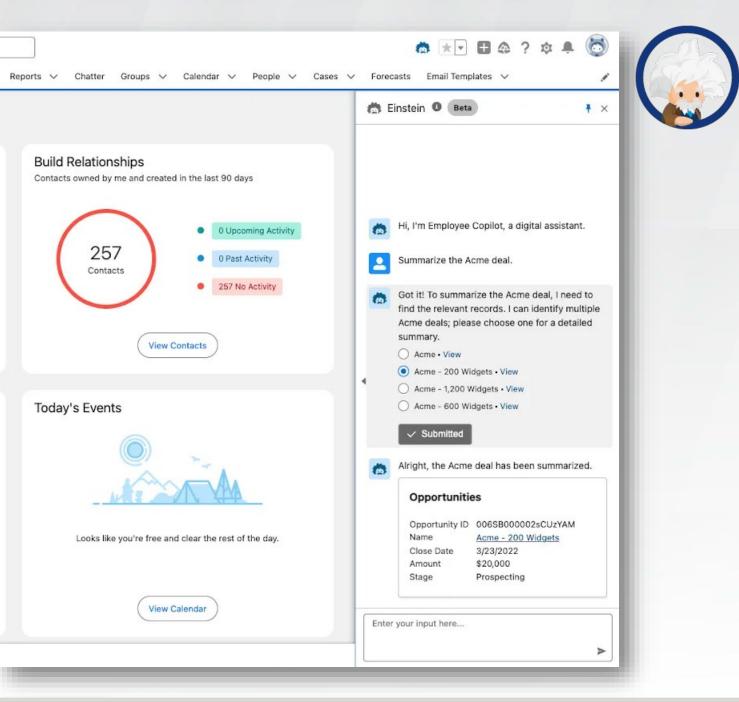
Einstein Copilot

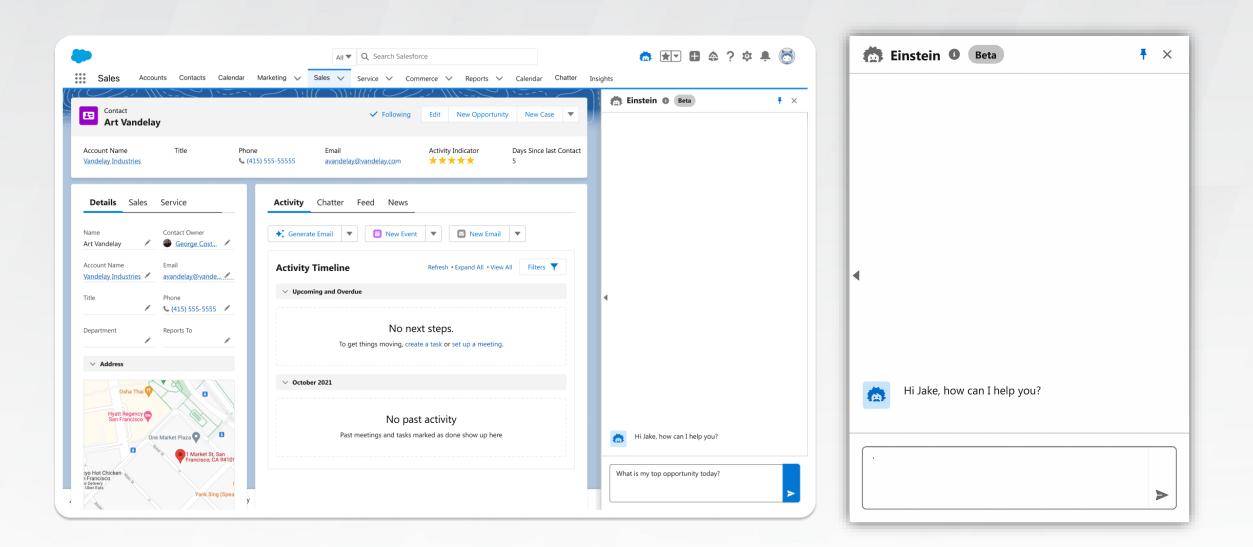
- Arrived in February 2024
- Conversational AI assistant for CRM
- Useful AI responses grounded with your company data
- Natively embedded across all Salesforce apps
- Maintains strict data governance

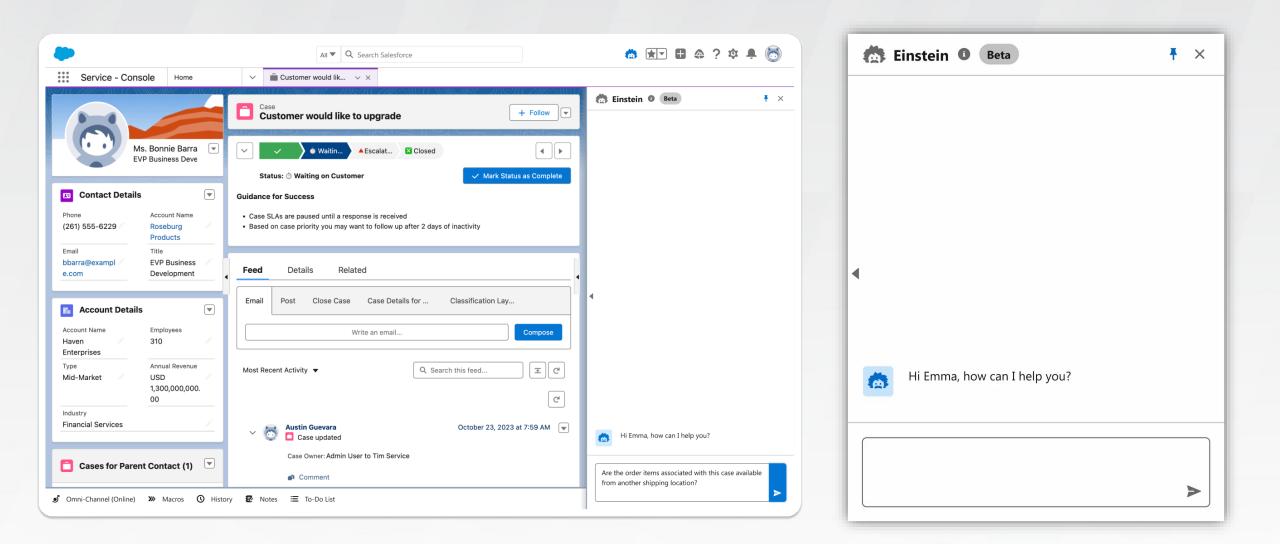


Einstein Copilot Use Cases

- Summarize Salesforce records, like opportunities, accounts, & cases
- Draft or revise sales emails
- Find Salesforce records
- Aggregate Salesforce data
- Answer questions with information from your knowledge base







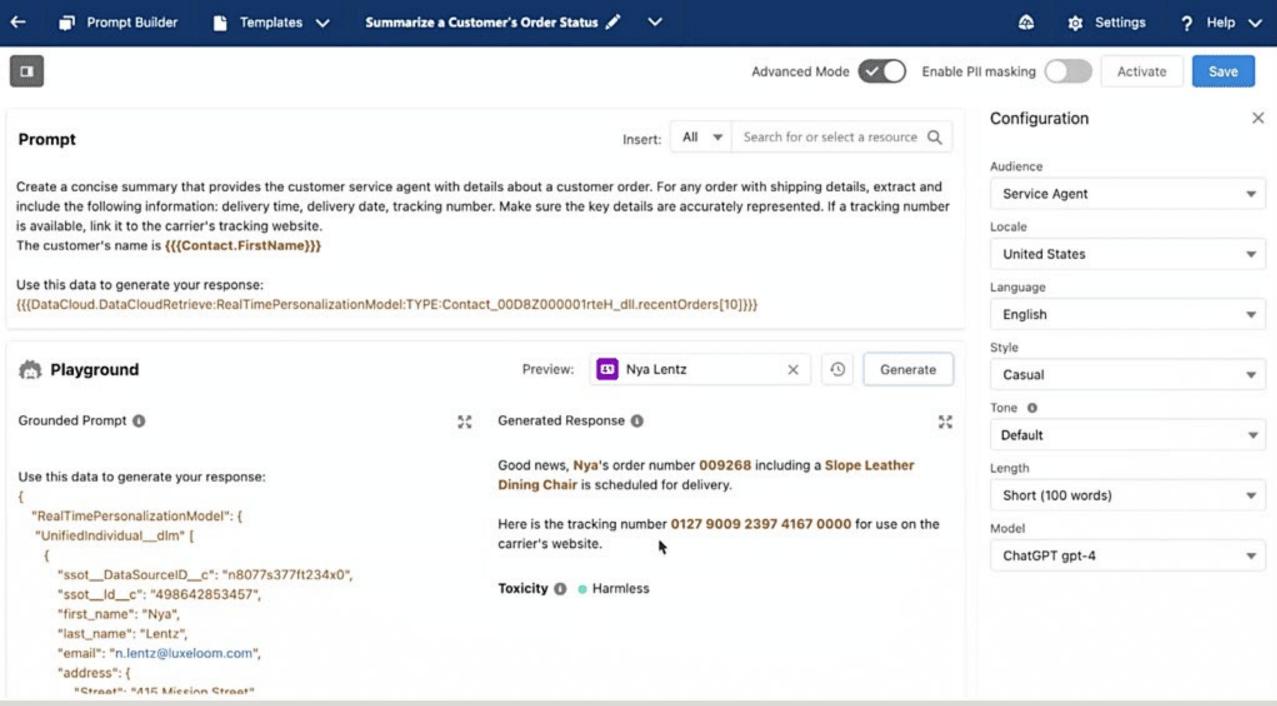
Prompt Builder



- Used to customize Einstein Copilot by creating prompts to generate personalized content
- Establish Prompt Templates for your users to use

Prompt Builder	
Prompt Insert: All Search for or select a resource C	Account Merge Fields Resources > Merge Field
	Resources > Merge Field
	A _a Account Name
	E Account Type
	Annual Revenue





Questions?



What's Next

Accelerating Business Growth With Salesforce

Wednesday, April 10



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WEBINAR

Accelerating Business Growth With Salesforce

Wednesday, April 10 • 1-2 p.m. ET

Thank you!

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