



salesforce

AI Insights: Unleash the Power of AppExchange

McCombs Marketing Case Challenge
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Meet the Team:



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Universities Represented:



Indian Institute of Management

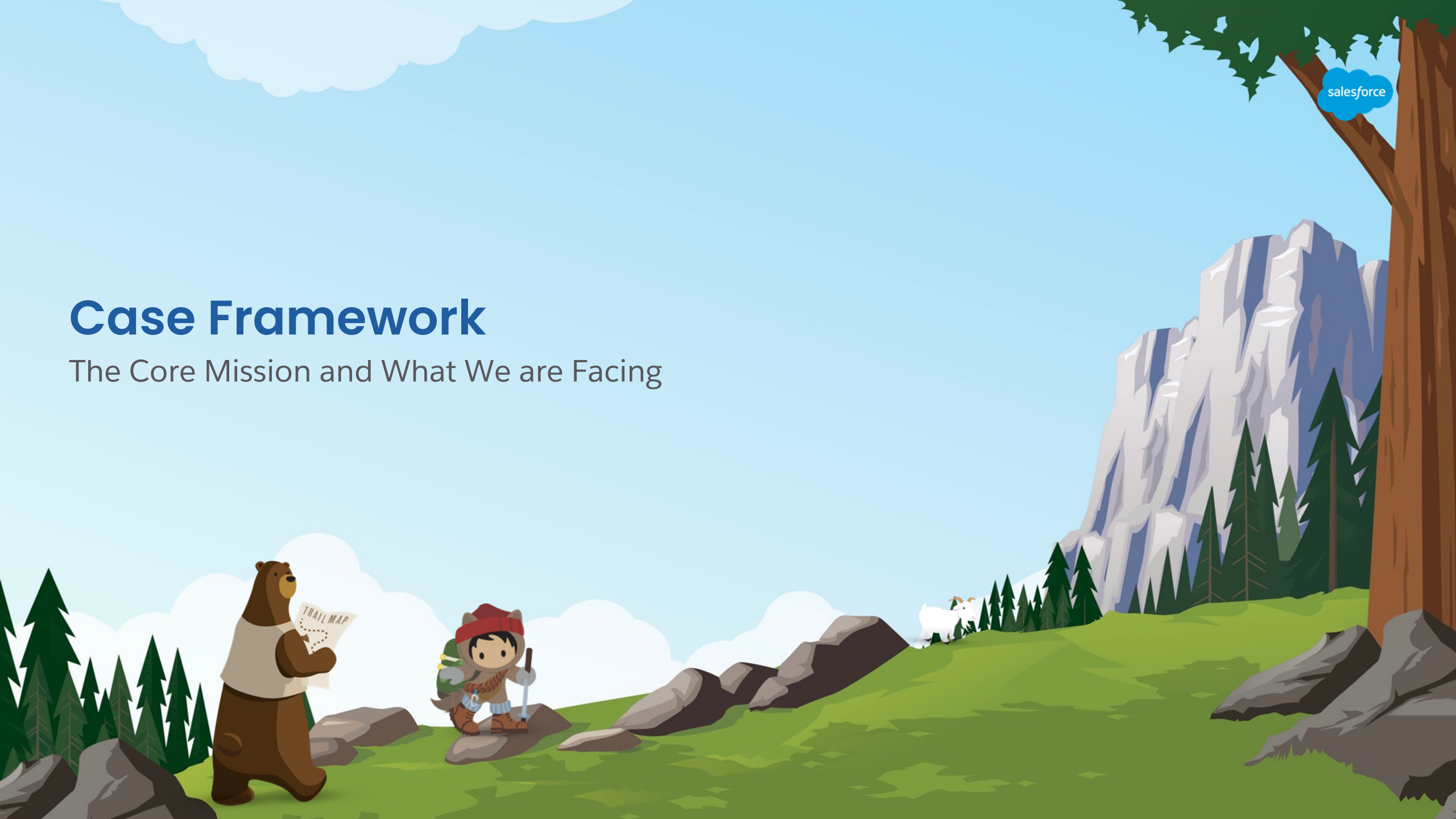


Previous Employers:



Case Framework

The Core Mission and What We are Facing

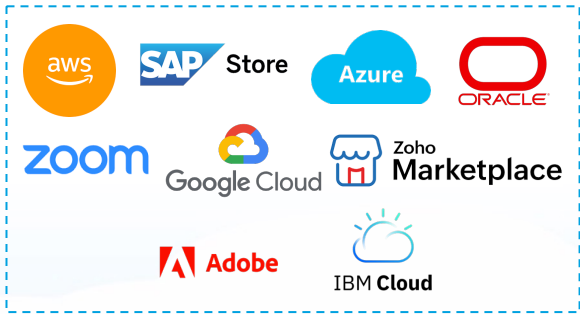


Executive Summary



Challenges

- How to Generate Awareness?
- How to Achieve Customized Experience?
- Cybersecurity Threats
- HEAVY Competition along with:



Opportunities

- Targeting Key Customer Segment
- Customer Journey Research
- Application of AI Tools
Collaboration with New Brands
- Leverage Analyst Relations &
Leverage Partner Network

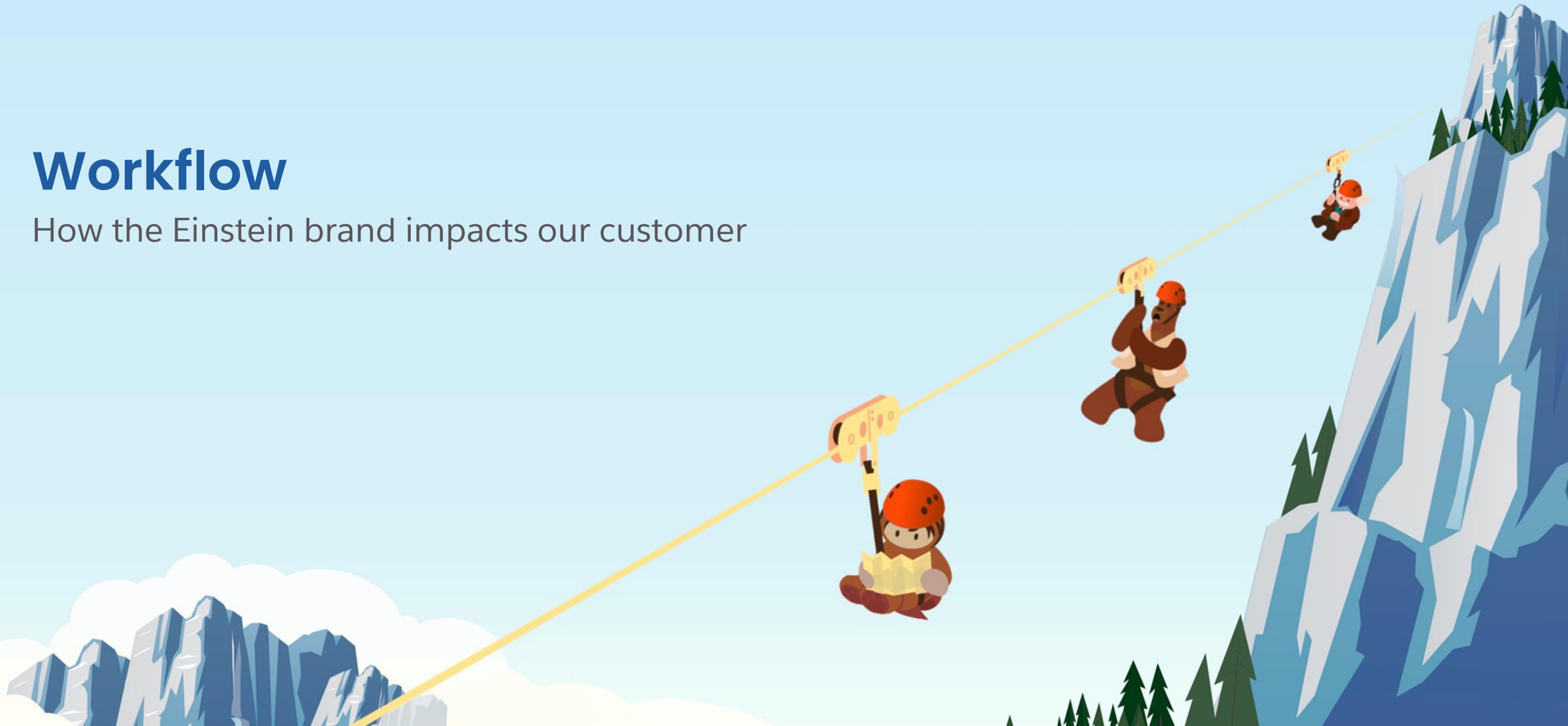
AI Insights

- Profiling, Segmentation,
Targeting, Customized User
Experience
- Detection Tracking,
Analyzing Conversions &
Live Chatting



Workflow

How the Einstein brand impacts our customer



Who is our customer?



10M+ hours volunteering to help others learn

Make the world a better place = Sustainability value



The Trailblazer

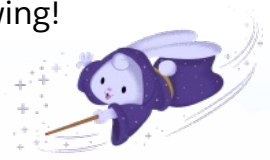
Looking for innovative ways to maximize success = Innovation value



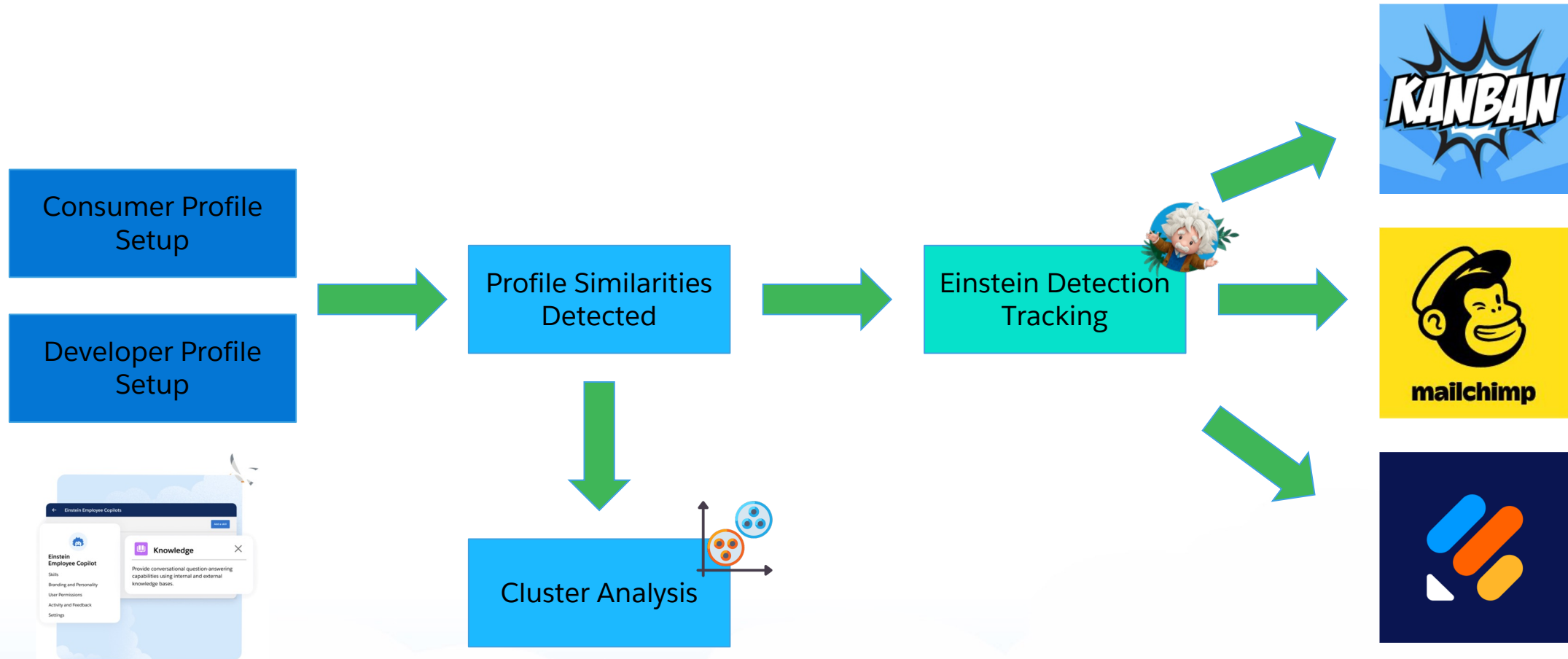
100B+ hours learned on the platform, 100M+ Trail Badges earned

Rely on the Salesforce community = Trust value

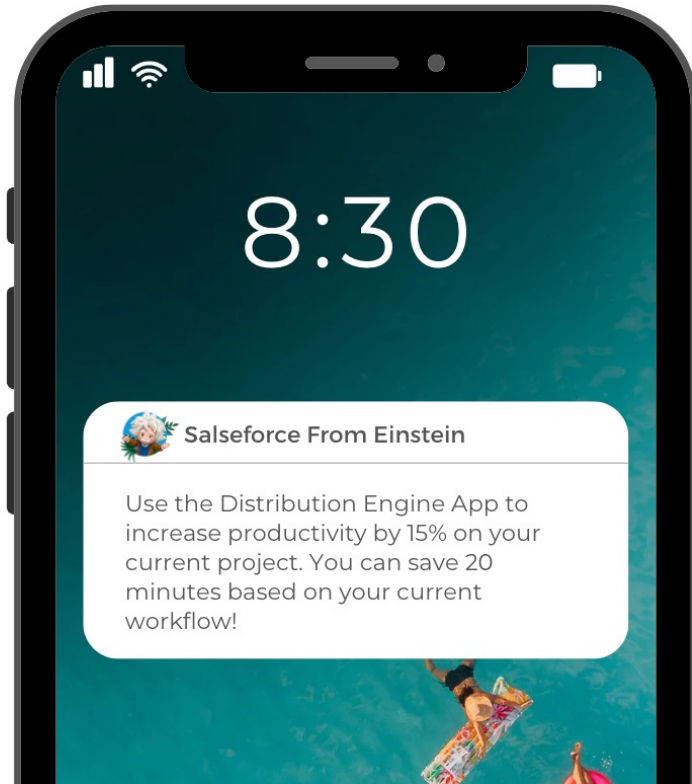
19.5M and Growing!



Consumer and Developer Workflows



Einstein App Detection – Productivity Notifications



Mobile

Notification from Einstein 10m ago

Try the Mopsy App rather than what you are doing to finish your project in 25 minutes. This will increase productivity by 30% and you can finish the project today!



Desktop



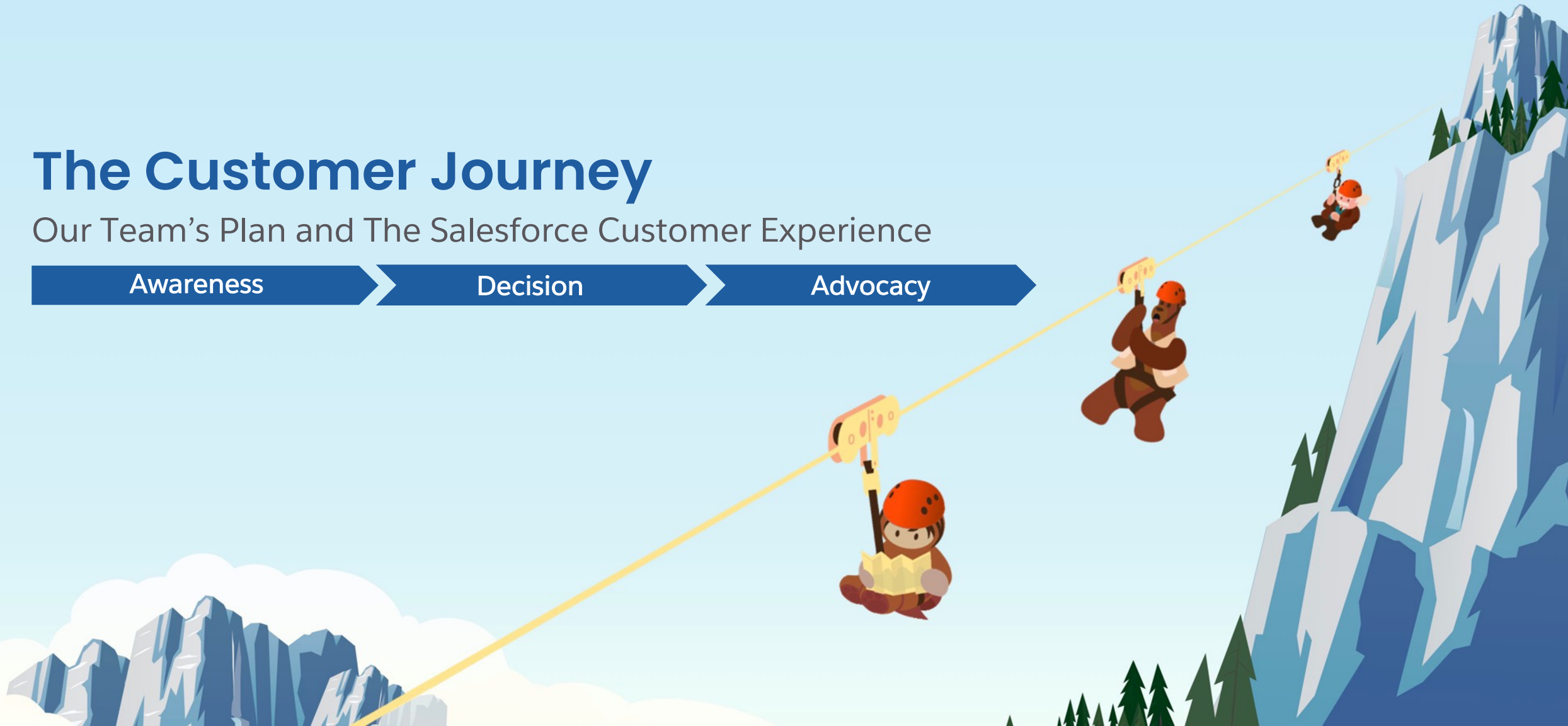
The Customer Journey

Our Team's Plan and The Salesforce Customer Experience

Awareness

Decision

Advocacy



Our Campaign using AI Insights



The Why
Goals:
Customer Acquisition & Segmentation

The How
Leveraging AI Insights

Prospecting Model-based list scoring Target Account List by Purchase likelihood Segmented TAL

AI Platform Options
einstein
Datahub

The What
Campaign Tactics:
Outbound Marketing

Lead Generation Segmented Messaging Lead magnet: ROI calculator and Analyst reports Email + LinkedIn + cold calls

The Outcome
ROI

Budget: \$35,000 Primary KPIs: Top of the Funnel leads: 500 - 1000, 4-5% CTR & 10,000 - 20,000 TAL Timeline: Week 1 - Week 12



Salesforce Customer Experience



The Why
Goals:
Customer Acquisition & Segmentation



The How
Leveraging AI Insights

Prospecting

Model-based list scoring

Target Account List by Purchase likelihood

Segmented Targeting



Einstein App Detection



Activity Scorecard Component App



LeadSpace Targeting App



Our Campaign using AI Insights



The Why
Goals:
Maximum conversion from MQL to SQL

The How
Leveraging AI Insights

Google Analytics Tracking/Scoring

Track KPIs

AI driven chat support

AI Platform Options

einstein

Demandbase

The What
Campaign tactics
Lead Nurturing

Platform Navigations & Training Support

Pricing Options

Sales team outreach & feedback collection

The Outcome
ROI

Budget: ~\$5000

Primary KPIs:
Maximum Conversion from MQL to SQL
100-200 SQLs: Assuming 20% MQLs qualify

Timeline: Week 3+



Salesforce Customer Experience



The Why
Goals:
 Maximum conversion from MQL to SQL

The How
AI Insights

Google Analytics Tracking/Scoring

Track KPIs

AI driven chat support



Einstein App Detection



Google Analytics Plug-In App



Liveperson AI Chat App



Einstein Bots App





The Why Goal:

Increase the CLV /
Improve UX

Our Campaign using AI Insights



The How AI Insights



Setup App Data
Streams: Usage
patterns, pain points



AI Recommendation System:
User & App based
Collaborative Filtering using AI
App Similarity index



AI Predictive
Modeling

AI Platform Options

**EINSTEIN RECOMMENDATION
BUILDER**



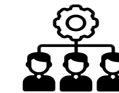
The What Campaign tactics



App Recommendations



Anti-Churn Offers



Client Prioritization



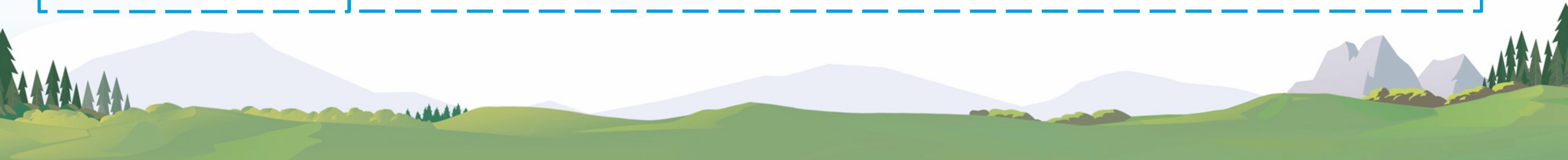
The Outcome ROI

Budget: ~\$3500

Primary KPIs:

Pipeline & Account Revenue
Increase in NPS

Timeline: Week 7+





The Why

Goal:

Increase the CLV /
Improve UX

Salesforce Customer Experience



Awareness

Decision

Advocacy



The How AI Insights



Setup App Data Streams



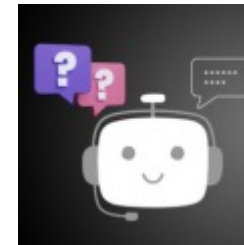
AI enabled Recommendation
System



AI Predictive
Modeling



Einstein App Detection



Recommendation
GPT App

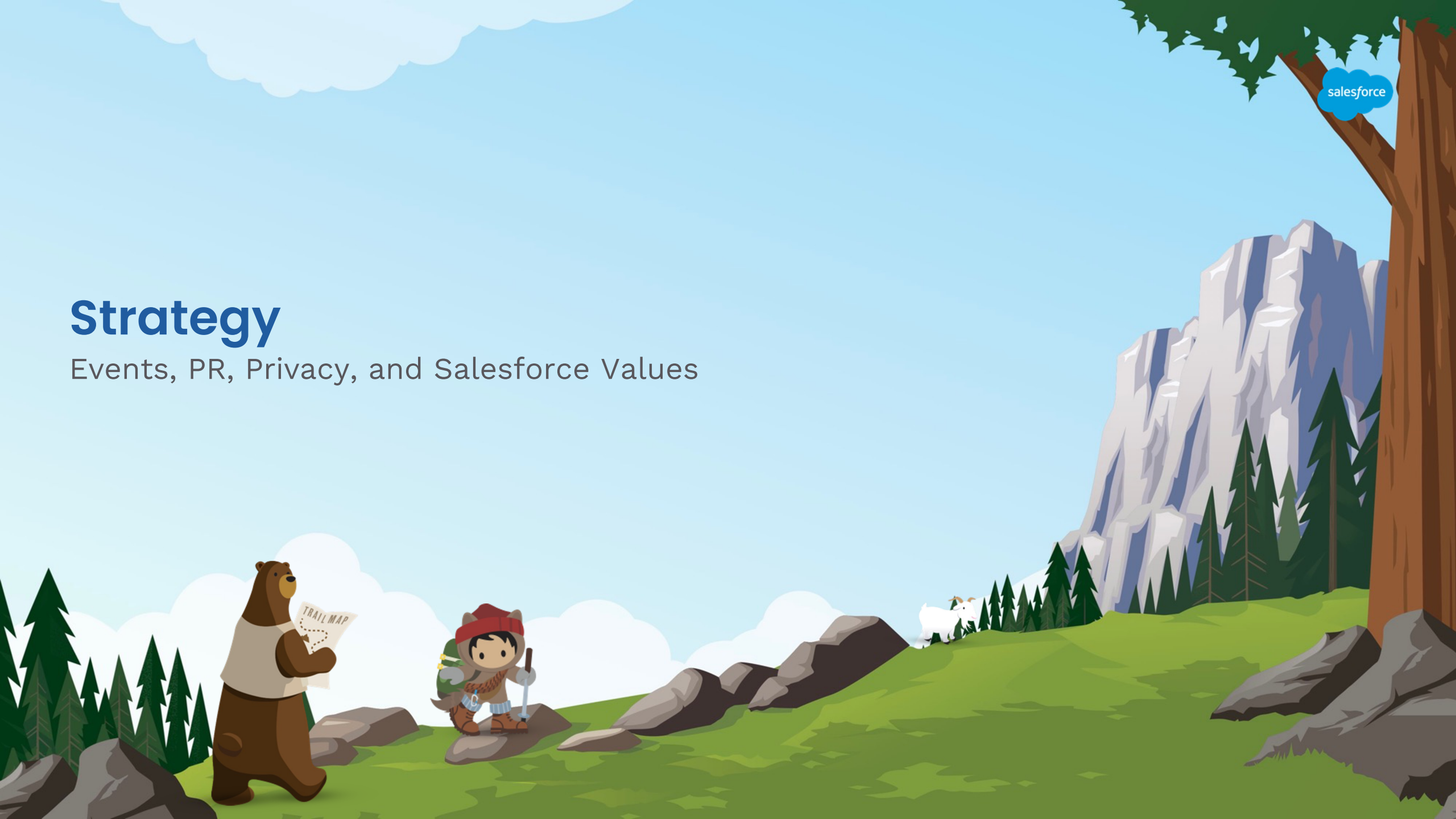


Listfit App



Strategy

Events, PR, Privacy, and Salesforce Values



PR Strategy



Digital

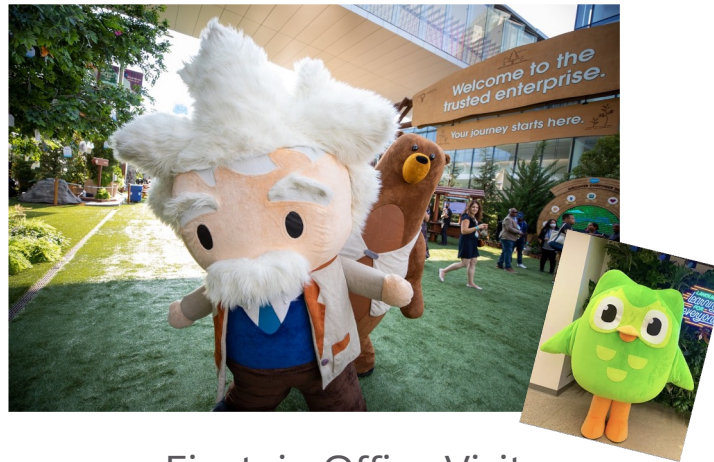


Press-Release



Collaborative Webinars

In-Person [Partnerships & Testimonials]



Einstein Office Visits



PR made simple!

350 PR Kit: Productivity Calculators



AI Apps to Consider



CISION

Media Tracking



Meltwater

Sentiment Analysis

BRAND24

Analyzing Conversions

Risks and Mitigation



Technical

- Integration Complexity
- Customization Limitations
- Performance Variability
- Data Portability



Financial

- Cost Management
- Vendor Lock-In.
- ROI Realization



Operational and Compliance

- Data Security
- Regulatory Compliance
- Support and Maintenance
- Training and Adoption



Executive Conclusion



The Challenge: Promote Salesforce AppExchange with AI driven Insights



Objective: Develop a plan to utilize AI insights to create campaigns that promote Salesforce AppExchange

AI Insights / Methodologies that were utilized:

1

AI-driven lead scoring

2

A/B Testing

3

Customer / App Profiling

4

Platform usage pattern identification

5

AI enabled Recommendation System

6

Modelling for Churn prediction

AI Platforms / Apps:



EINSTEIN RECOMMENDATION BUILDER



Budget



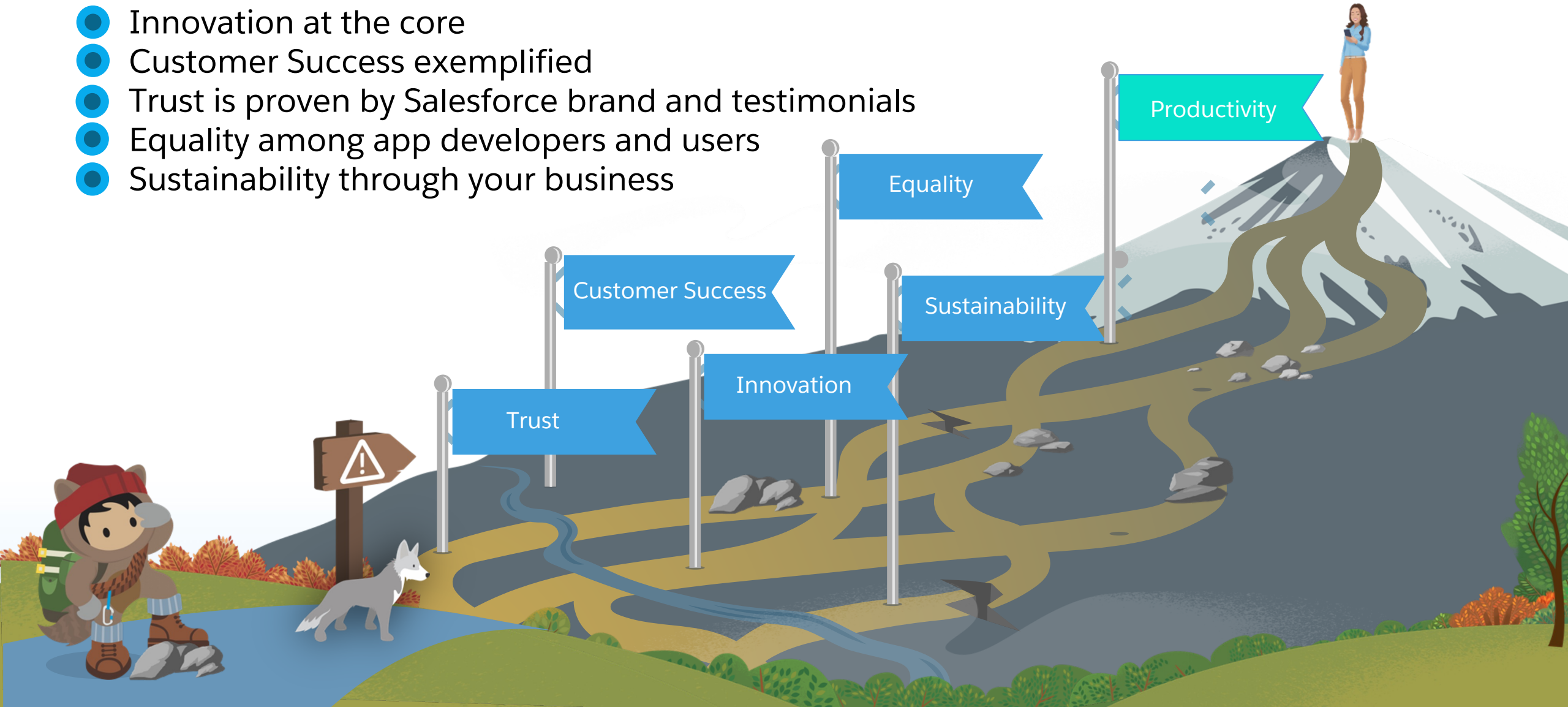
Total Campaign Budget: ~\$43,000

+ \$1M for AI Implementation

Our Campaign x Salesforce Values



- Innovation at the core
- Customer Success exemplified
- Trust is proven by Salesforce brand and testimonials
- Equality among app developers and users
- Sustainability through your business



thank you



Sources



- Salesforce Facts and Figures – [Link](#)
- Salesforce App Exchange – [Link](#)
- Einstein Capabilities – [Link](#)
- Key Player of the Cloud Market Service Industry – [Link](#)
- Risks of Organizational AI Adoption – [Link](#)
- Security and Data Concerns with AI – [Link](#)
- Forrester Report - [Link](#)
- Business Research Center, UT

