



salesforce

Einstein Discovery in Tableau

Hands on Webinar

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Salesforce.com, inc. assumes no obligation and does not intend to update these forward-looking statements, except as required by law.



Thank You



Agenda

Prerequisites

- Tableau CRM Trial: <https://developer.salesforce.com/promotions/orgs/analytics-trial-de/>
- Tableau 2021.1 or beyond: <https://www.tableau.com/trial/download-tableau>
- Download CSV and Viz: [Data + Workbook Zip](#)

Introduction and Demo

Hands On Exercise:

- Tableau CRM - Create and Deploy Prediction
- Tableau - Add Einstein Discovery to Dashboard

Einstein Discovery for Tableau Examples & Use Cases

Additional Resources and Links



Machine Learning Can Transform Decision Making



AI-powered insights fuel actionability, helping drive business forward



1990s

Humans &
Rolodexes



2000s

Humans &
Databases



2020+

Humans &
Machine Learning

86%

of executives claim that AI is going to be a “mainstream technology” at their companies in 2021

Data Science Today Is:

- Business critical
- Highly precise
- Driven by technical experts

87%

of data science
projects never make it
into production*

Tableau Business Science



A new class of AI-powered analytics that lowers the barrier to data science techniques, enabling business users and analysts to make smarter decisions faster. Business Science empowers more people with data, with guided model creation, predictions, what-if scenarios, forecasting and other analytical methods – all using clicks, not code.

Simple & Fast



Clicks not code, guided model building, revise and redeploy approach

Faster Decision Making

Trusted



Ethical and transparent AI, model monitoring, key driver analysis and bias protection

Increased Transparency

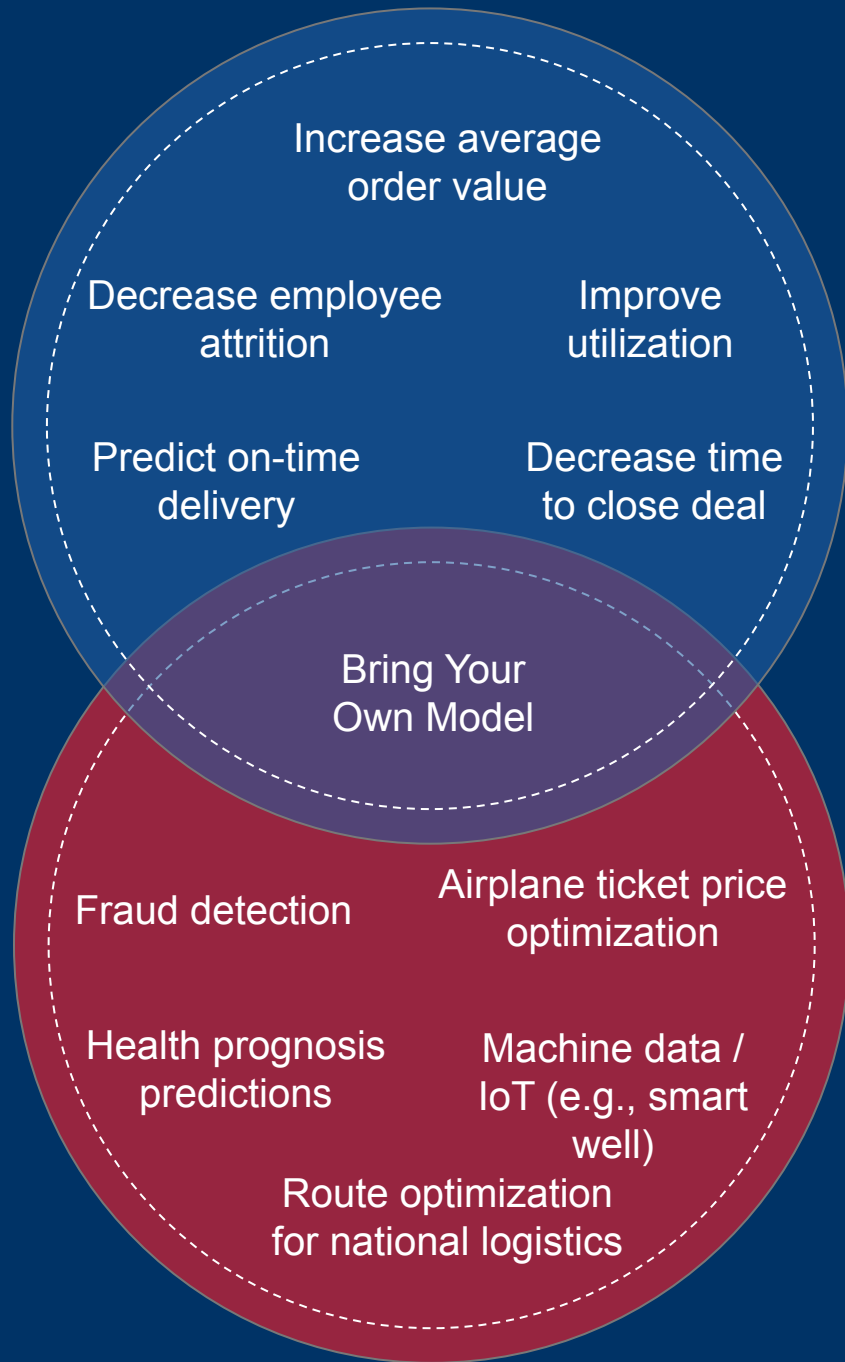
Integrated



Build, deploy, and operationalize within Tableau workflows

Reduce Resource Burdens





Immediacy
and Context
First

Business Science

Not a one-size fits
all approach

Precision First

Data Science

Einstein Discovery

in Tableau



Einstein Discovery

Trusted, automated model training and deployment in minutes

Supervised machine learning

No code required

Ethical and transparent ML

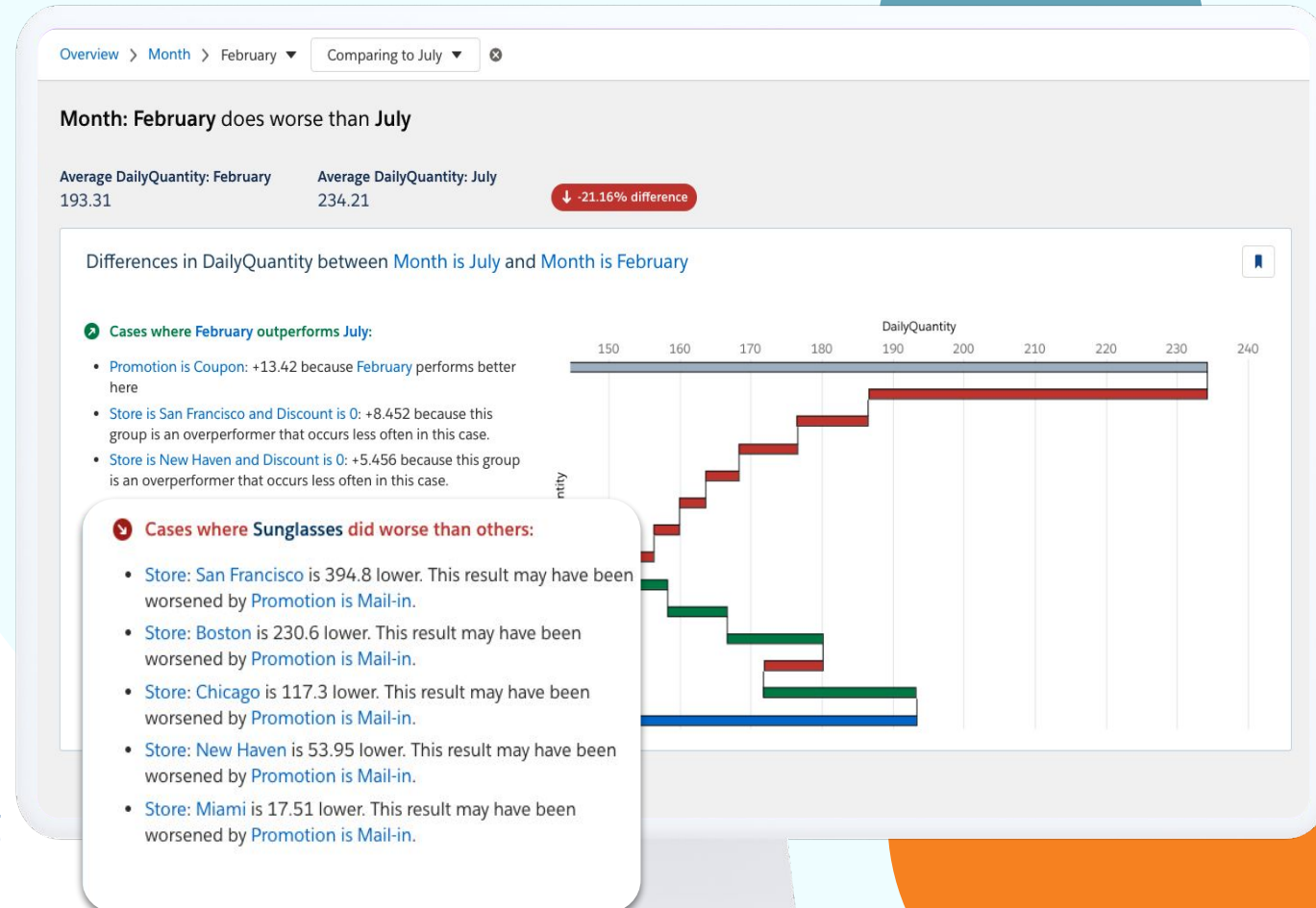
Component driver analysis

Rapid iteration

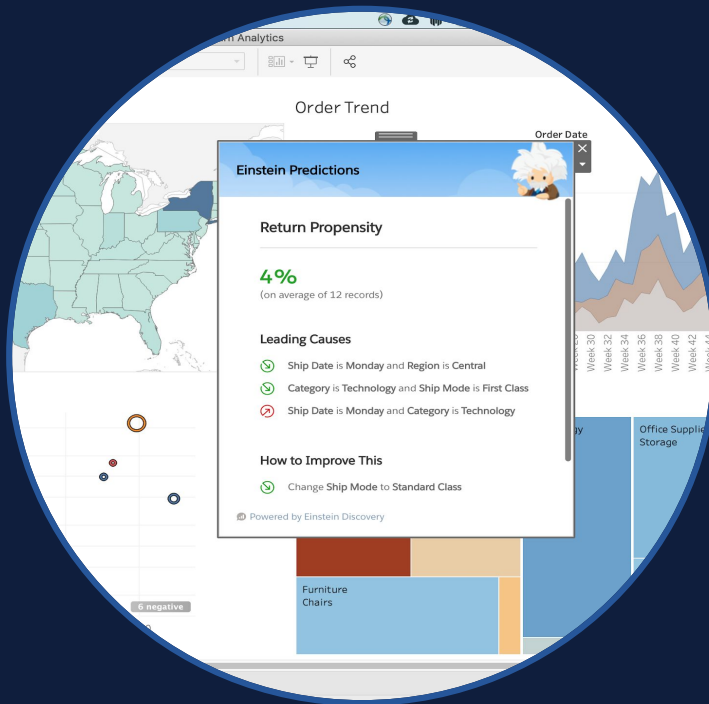
Combine data from anywhere

Live model monitoring

Last mile prediction delivery

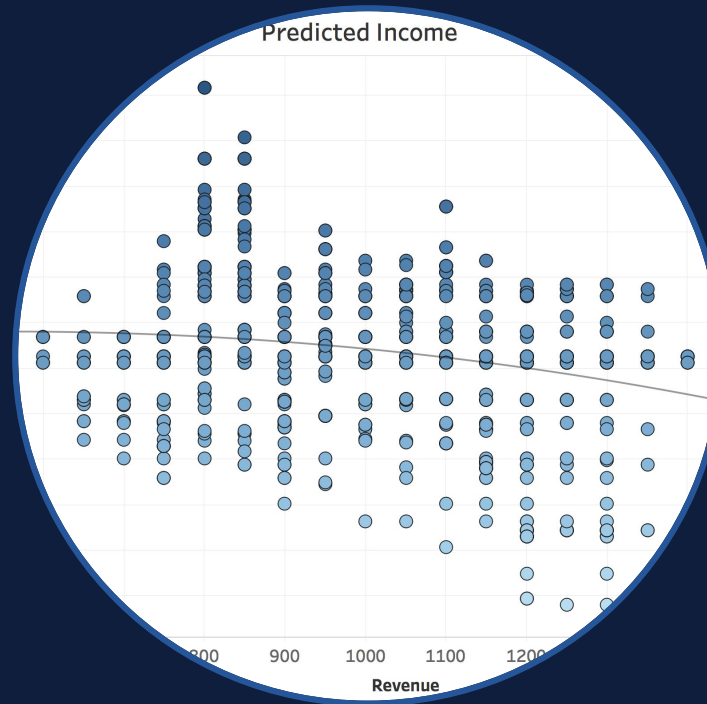


Three Ways to Bring in Einstein Predictions



Dashboard Extension

Access real-time predictions in dashboards



Analytics Extension

Integrate real-time predictions in vizzes

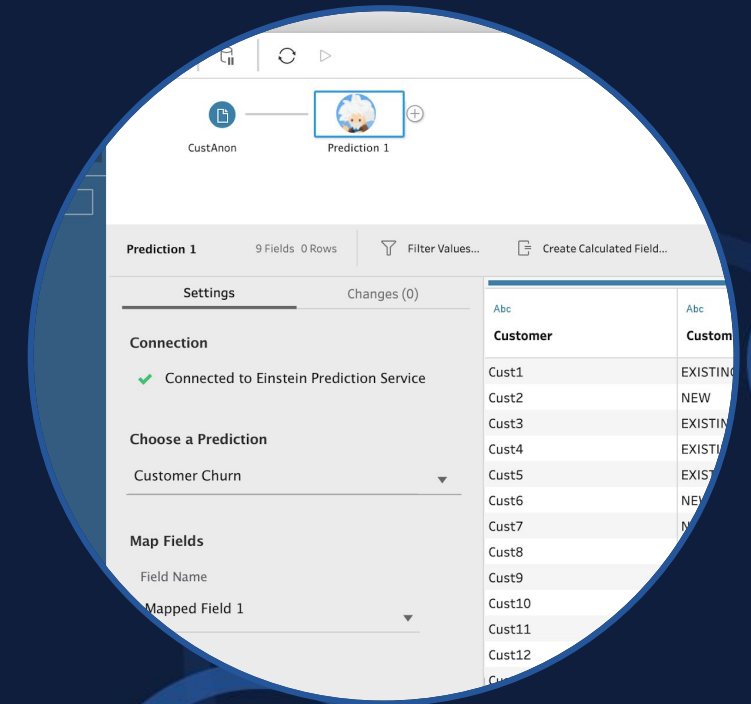


Tableau Prep

Add predictions to your datasets

Demo

Einstein Discovery in Tableau



Hands On

Einstein Discovery in Tableau



Hands on Exercise

Tableau + Einstein Discovery

Prerequisites

- Tableau CRM Trial: <https://developer.salesforce.com/promotions/orgs/analytics-trial-de/> (Verify email, Set password)
- Tableau 2021.1 or beyond: <https://www.tableau.com/trial/download-tableau>
- Download CSV and Tableau Dashboard: [Data + Workbook Zip](#)

Instructions

1. Tableau CRM
 - Upload CSV to create Dataset
 - Create Story to maximize **Applications**
 - Deploy Story without mapping to Salesforce object
2. Tableau
 - Open Tableau Dashboard (Add “Use for ED Workshop” worksheet)
 - Add the **Einstein Discovery** Extension to Tableau Dashboard
 - Connect to Tableau CRM Trial with your unique login
 - Select Prediction Definition (your deployed story name)
 - Map fields from Tableau worksheet to Einstein Discovery Story





Example Use Cases

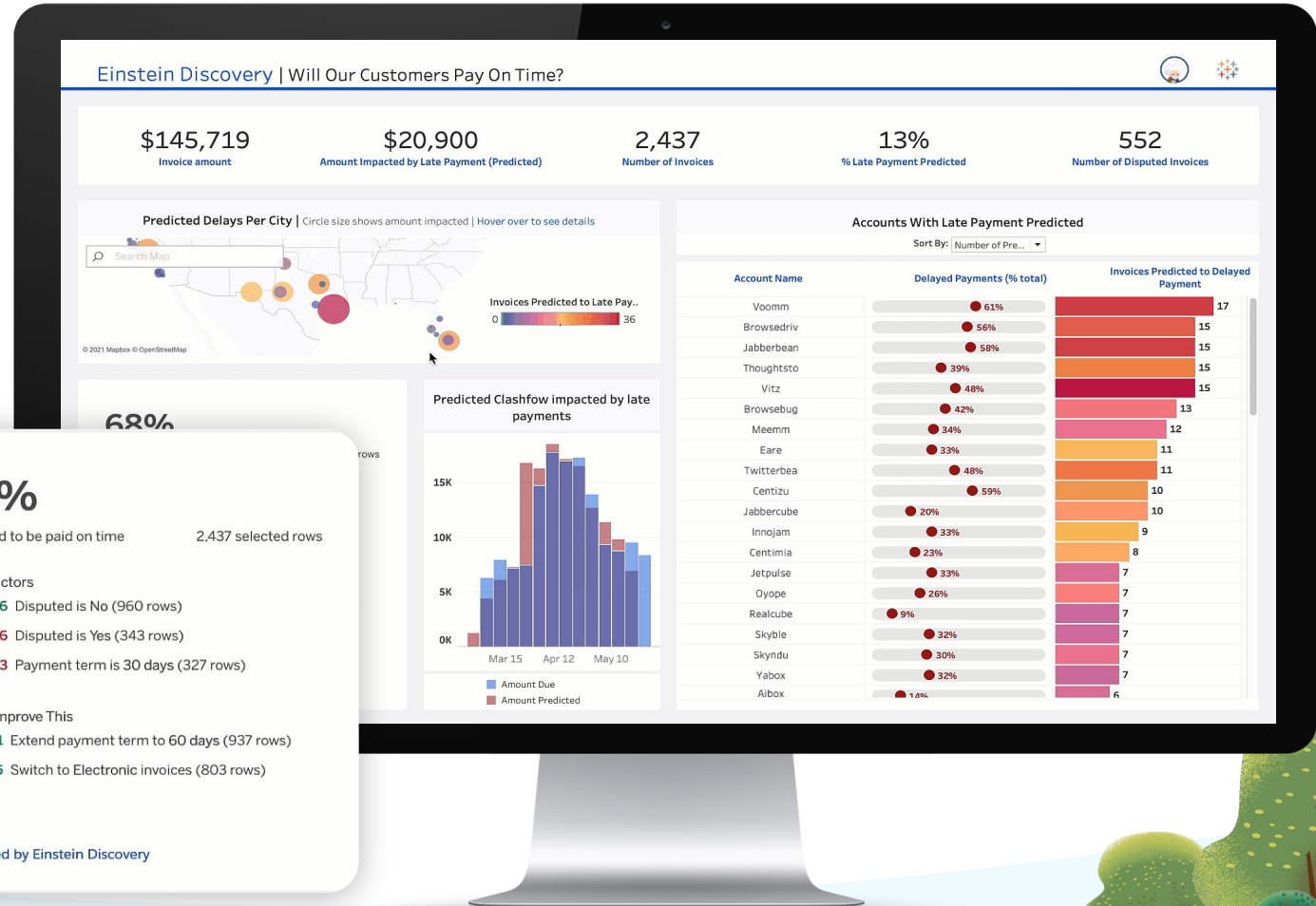
Einstein Discovery in Tableau



Forecast Cash flow and On-time payments



What are expected payments and late payments so I can forecast cash flow and target my account collection activities?



What Are Some Things I Can Predict?

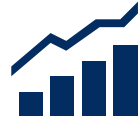
By function

Finance



-
- Forecasting revenue
 - Late payments
 - Invoice fulfillment
 - Returns
 - Maximize margin
 - Cost reduction
 - Reduce attrition
 - Reduce compliance risk
 - Improve margin

Wealth Management



-
- Likelihood to grow
 - Likelihood to increase AUM
 - Reduce agent attrition
 - Recommend new products
 - Improve client relationship score
 - Reduce client churn

Retail Banking



-
- Likelihood to open new account
 - Likelihood to purchase product
 - Predict customer churn risk
 - Best Campaign Fit
 - Reduce employee attrition

Mortgage & Lending



-
- Likelihood to purchase (B2B)
 - Best Product Fit
 - Probability of late payment
 - Probability of early repayment



Additional Resources

Check Them Out!

[Everything You Need on Einstein Discovery \(quip\)](#)

[Einstein Discovery Whitepaper](#)

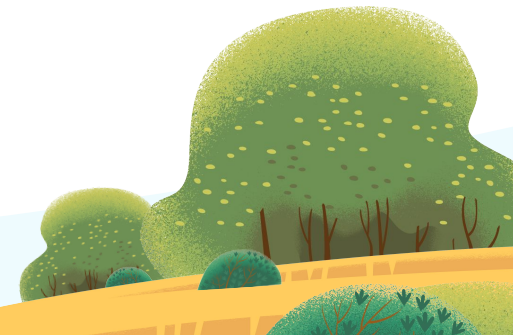
[Einstein Discovery Trailheads \(training\)](#)

[Einstein Discovery Best Practice Videos](#)

[Tableau CRM Academy Videos](#)

[Einstein Discovery in Tableau – Try it for Yourself \(blog\)](#)

[Einstein Discovery Deep Dive \(blog\)](#)



Thank You



Pricing and Packaging



Ways to Buy



[Click here for pricing page on salesforce.com](#)

TCRM Plus

Advanced analytics platform with
AI built in

\$150 PUPM

(Includes all Tableau CRM industry SKUs)

Einstein Predictions

Automated discovery and
predictive insights

\$75 PUPM

Einstein Discovery in Tableau add-on

Predictive insights surfaced
natively in Tableau

\$25 PUPM

(Requires separate Tableau licensing)

