AI BASICS // CHOOSING A PLATFORM

Salesforce isn't just a CRM anymore

How Einstein AI connects your sales, service, marketing and commerce teams around one source of truth — and whether it's right for your business.

> **Travis's short version:** Salesforce is a connected ecosystem, and Einstein is the intelligence that ties it together. Here's how it works under the hood, with one customer story to make it real.

Here's the reality for most businesses

Marketing is running campaigns in one platform, sales is chasing leads in another, service is firefighting somewhere else, and commerce is just trying to keep up. Everyone's doing their best, but they're not speaking the same language. That's exactly what Salesforce sets out to fix: connect every part of the business around the customer, so everybody works from the **same data, the same insights and the same truth**.

Think of it as a set of specialised "clouds" on one shared data model

Each cloud does its own job, but they all sit on one connected foundation. On their own they're powerful. Add Einstein AI and that's when things really start to connect. Here's what Einstein does in each one:

Cloud	What it's for	What Einstein adds
Sales	Leads, pipeline and forecasting — everything that drives growth.	A digital co-pilot. Scores leads on how likely they are to convert, ranks deals by health, and suggests the best time to reach out. Less chasing noise, more closing.
Service	Customer support, with the context to solve problems faster.	Classifies incoming cases, routes them to the right agent and suggests the next best action based on what's worked before.
Marketing	Personalised engagement: right customer, right time, right message.	Learns what content resonates with each audience and when to send it, so a campaign feels more human and less like a mass blast.
Commerce	The shopping experience — every click, cart and checkout.	Predictive sorting puts the right products on top, recommends add-ons and personalises search from past behaviour.
Experience	Portals for customers, partners and employees.	Tailors what each person sees by role, history and the intent behind their questions.

Where it all comes together

Right, this is the part I like most. Einstein doesn't just improve each cloud, it **links them into one learning loop**. When a deal progresses in Sales, those insights flow into Marketing, which sharpens who to target and what to say. The same sales data feeds Service, so when a customer reaches out, the agent already has the full story, from purchase history to past conversations. Service outcomes and satisfaction scores then loop back into Marketing to fine-tune future campaigns and retention. Commerce connects purchase behaviour to lead potential, and flags who's ready for cross-selling. Every interaction makes the next one smarter.

Meet Emma: one customer, one connected flow

Let's bring this to life. Emma is browsing an online sports gear store powered by Commerce Cloud, and this is where the magic kicks in. Here's what happens behind the scenes.

1. **She browses.** Einstein reads the signals — what she views, what she skips, how long she hovers — and serves a homepage built around her instead of a static one.
2. **She abandons her cart.** Resistance bands and a yoga mat go in, but she doesn't check out. Classic drop-off moment. Einstein flags it and a re-engagement email fires from Marketing Cloud, timed for when she's most likely to open it, with 10% off her first order.
3. **She buys.** Einstein updates her profile in Sales Cloud, tagging her as high-intent. Purchase history, preferences and engagement sit in one profile every team can see. No silos, no delays.
4. **Something goes wrong.** A week later the resistance band snaps (classic defective product) and she submits a service case. Einstein classifies it and routes it to the right agent before she's finished typing. The agent sees the full story, even that re-engagement email, and a replacement is on its way.
5. **The loop closes.** Had it gone badly, Einstein would have spotted the risk and escalated to a specialist. Instead, a thank-you and a personalised offer go out, and the data flows back to Sales so the business can see the full impact, from response times to customer lifetime value.

It's not just customer service anymore — it's a learning system.

Strengths and trade-offs

Where it shines	The trade-off
Einstein is built in. No data scientists and no complex setup, just predictive insights and automation inside the tools your teams already use. It's fast to adopt, easy to measure the return on investment, and designed for collaboration across departments.	Einstein works best when you're fully invested in Salesforce. If your stack spans multiple platforms, or you want deeper control over your AI models, you'll probably look at something like AWS or Google Cloud instead.

The bottom line

Really, that's the magic of Salesforce: **one ecosystem, one customer view and one intelligent brain** connecting it all. Einstein isn't just automation, it's augmentation. It learns from every interaction so your teams can deliver experiences that are smarter, faster and more human.

Want to talk this through for your business?

Book a free 15-minute call. We'll look at your situation and give you a straight answer, with no jargon and no sales pitch.

Let's Chat

Opens the request form on our website. Free, no obligation.