

Einstein Call Coaching

The world's #1 CRM now includes conversation intelligence for your inside sales team.



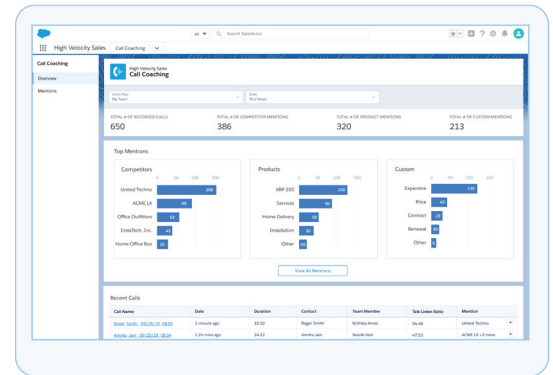
Everyone wants high performers on their sales team. After all, successful teams are what drives strong sales. So how can you make sure you're maximizing your sales employees' performance, especially in a world where virtual selling is on the rise? You need to power your sales coaching with conversational intelligence.

Introducing Einstein Call Coaching – Salesforce's new conversational intelligence feature built in to High Velocity Sales, a Sales Cloud add-on product.

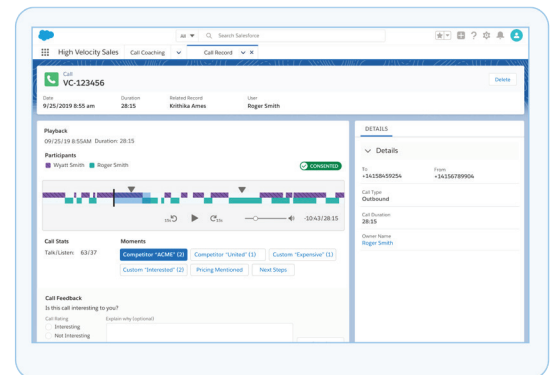
Einstein Call Coaching surfaces key moments in your sales rep's conversations with customers. Managers can quickly zoom in to important parts of the conversation in an audio player to listen for mentions of competitors, products, pricing discussions, and next steps. This information can then be used to identify a reps' strengths and areas for improvement, allowing managers to personalize their coaching. Collected across the team, these insights can quickly surface best practices and facilitate more effective sales conversations.

Key Features

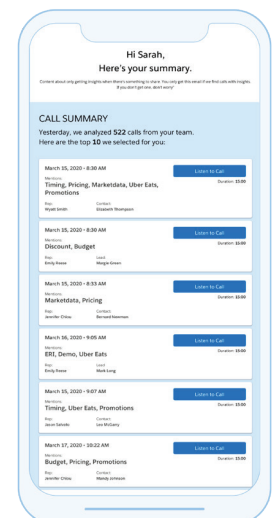
Simplify call reviews by focusing on conversation trends about competitors, products, and custom mentions to know where to direct your coaching efforts.



Dig deeper into relevant calls by reviewing keyword mentions, talk-listen ratios, speaker tracks, participants, and duration, to personalize coaching for every sales rep.



Stay up to date on important call metrics through ongoing insights, highlights, and reports to achieve your coaching objectives.



Customer Results

8%

INCREASE IN REVENUE
DUE TO CRITICAL
MOMENTS SURFACED
ON SALES CALLS.*

Key Benefits

- **Coach sales reps for maximum performance** – Gain visibility into sales reps' customer interactions by zooming in to key call moments for individual reps
- **Enable best practices at scale** – Accelerate onboarding, enablement, and continued success by uncovering business insights and sharing them across teams
- **Unlock market insights** – Define strategy based on conversation trends and prepare teams to handle trending topics

*Armstrong Steel

How Einstein Call Coaching Works

Einstein Call Coaching is an AI feature that processes existing call audio recordings and surfaces insights. **It does not record calls.** Rather, you connect it with your recording system such as Lightning Dialer or other supported partners. It is a customer's responsibility to manage consent and comply with local privacy requirements in the way calls are recorded.

Define Keywords

Sales managers can work with Salesforce admins to define keyword insights in three categories (competitors, products, and custom mentions). Einstein Call Coaching will also track insights for next steps and pricing, which occurs automatically and does not require further configuration.

Collect Conversations

Einstein Call Coaching collects your recorded conversations in one place within Salesforce High Velocity Sales. For those customers using Lightning Dialer to record calls, calls will be streamed to Einstein Call Coaching. For those customers not using Lightning Dialer, you can connect your call recordings to Salesforce. Please talk to your account executive and your telephony provider to understand its API compatibility with Einstein Call Coaching.

Process Recordings

The compiled recordings are processed by our AI system for transcription and insights detection.

Analyze Transcriptions

Einstein Call Coaching will use AI to spot key moments based on key moments based on keywords and phrases defined by your Salesforce admin.

Currently, Einstein Call Coaching is available in English and transcription accuracy is optimized for the North American accent.



Security and Privacy

Salesforce is dedicated to keeping our customers and their data secure. To protect privacy, ensure confidentiality, and prevent recordings and insights from being shared across the organization, Einstein Call Coaching has built-in controls at the user and administrative levels.

Access to Recordings

Users who want to listen to audio recordings must request Call Coaching access from their administrator. These users are limited to sales calls based on their role hierarchy. That means managers can review sales calls made by their entire team, while single reps can only access their own calls.

Recording Consent

Einstein Call Coaching does not record calls. Customers manage their telephony and recording policies independently with tools of their choice, and control whether they want to connect and use this feature. Customers should ensure their recording policies comply with local requirements, including consent.

Storage of Recordings

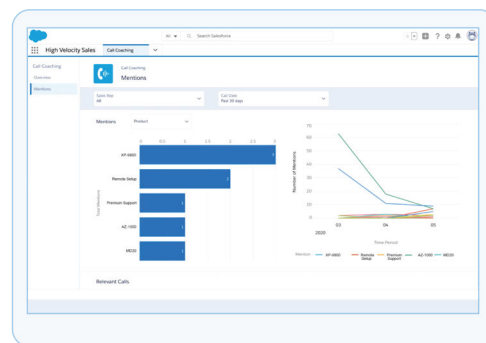
Recordings from third-party telephony providers are duplicated and stored in the Salesforce Platform. These recordings do not get counted against customers' data storage limits. Because trust is paramount, we leverage our Customer 360 Truth Platform to securely store the recordings and control who has access to them. Customers can choose how long they would like to store these recordings for by working with [Salesforce Customer Support](#). The default time period will be two years.

Personally Identifiable Information

Personally identifiable information (PII) cannot be actively searched in Einstein Call Coaching or used in training modules. As mentioned above, Einstein Call Coaching is an AI feature that processes recordings and surfaces insights from the call recordings you provide. Einstein Call Coaching does not record calls. You should work with your telephony provider to understand their terms and conditions on PII. If your telephony provider does not remove PII from your call recordings, PII may be heard during audio playback of the call in Einstein Call Coaching's call recording player. In this case, customers should refine their training processes around how to deal with PII to prevent misuse.

Deletion of Recordings

The details of each call and its recording file is stored in the voice call record, which is a standard object in Salesforce. Administrators can manually delete a voice call record from the voice call record details page. This will delete all relevant data associated with the call across our technology stack. Administrators can also access voice call records through a list view or custom report.



Technical Specifications

Salesforce Product Requirements	
Sales Cloud	✓
High Velocity Sales Add-on	✓
Salesforce License Requirements	
Enterprise Edition	✓
Unlimited Edition	✓
Audio File	
Language	English (North America)
Format	MP3, FLAC, WAV
Data Source	
Voice Call	✓
Telephony Integrations	
Lightning Dialer, Tenfold, or Redbox Voice	✓
Custom Integrations	sfdc.co/eccustom
Supported Telephony Providers	sfdc.co/hvsapps
Privacy Settings	
Access to Recordings	Salesforce Role Hierarchy
User Experience	
Lightning Experience	✓

Ready to see Einstein Call Coaching in action? Check out the [High Velocity Sales Demo](#).

Sales Cloud Einstein includes Einstein Lead Scoring, Einstein Opportunity Scoring, Einstein Account Insights, Einstein Opportunity Insights, Einstein Activity Capture, Einstein Automated Contacts, Salesforce Inbox, and Sales Analytics. It is \$50 per user per month. Existing customers with the Sales Cloud Lightning CRM SKU or Service Cloud Lightning CRM SKU EE/UE will be able to buy Sales Cloud Einstein. New customers will be able to purchase Sales Cloud Einstein with the Lightning Sales Cloud SKU and the Lightning CRM SKU at EE/UE. New customers will not be able to buy Sales Cloud Einstein with the Lightning Service Cloud SKU. Sales Cloud Einstein Summer '18 is available in English only. Native Pardot integration will be available in a future release.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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