



Implementation Guide: Einstein Features in Account Engagement

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EINSTEIN ACCOUNT ENGAGEMENT: SCORING AND INSIGHTS

Use Einstein artificial intelligence to prioritize work and generate data-driven attribution data for your sales and marketing teams. Einstein features analyzes data from Account Engagement and Salesforce to show straightforward scores and insights on your most engaged prospects and effective campaigns.

EDITIONS

Available in: Account Engagement **Advanced** and

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Performance, and **Unlimited** Editions

[Einstein Behavior Scoring](#)

Einstein Behavior Scoring identifies prospects whose behavior suggests that they're ready to buy, and scores them based on Einstein's engagement model. After you turn on the feature in Marketing Setup, decide where to show scoring data. To get a picture of how Einstein creates your scoring model, set up B2B Marketing Analytics and include the optional Einstein Behavior Scoring dashboard.

[Einstein Campaign Insights](#)

Add Einstein Campaign Insights to your Lightning pages to learn what factors drive campaign performance. Einstein's intelligence can help you optimize campaign assets and find new audiences. Turn on the feature in Marketing Setup and add the Einstein Insights component to your Lightning pages.

[Einstein Attribution](#)

Einstein Attribution combines Campaign Influence with Einstein's intelligent analysis to more accurately assign campaign attribution. Instead of choosing a model before you start reporting, you can use Einstein Attribution to analyze historical campaigns and find emerging patterns. Einstein allocates conversion credit to multiple campaigns, so you can see which campaigns are most effective at generating pipeline.

[Optimize Send Times with Einstein](#)

When you're ready to send a list email, boost prospect engagement with the power of AI. Einstein evaluates historical email engagement data in Account Engagement to recommend an optimal send time for the individual prospects on your lists.

[Einstein Key Accounts Identification for Account Engagement](#)

Einstein's AI helps you identify candidates for your account-based marketing efforts. It creates a scoring model based on your previous opportunity creation data and provides a tier ranking for individual accounts. You can use the account tier to target ideal prospects in engagement programs, automation rules, and dynamic lists. In addition, account attributes and engagement metrics are included as insights to help you focus your plans.

[Einstein Features in Account Engagement FAQ](#)

You might still have a few questions about how Einstein features work, or how they differ from one another.

[Resources](#)

Looking for more? Check out these resources.

Einstein Behavior Scoring

Einstein Behavior Scoring identifies prospects whose behavior suggests that they're ready to buy, and scores them based on Einstein's engagement model. After you turn on the feature in Marketing Setup, decide where to show scoring data. To get a picture of how Einstein creates your scoring model, set up B2B Marketing Analytics and include the optional Einstein Behavior Scoring dashboard.

Einstein Behavior Scoring is available in Salesforce list views and Lightning pages, and as criteria for workflow rules and Process Builder. You can also find behavior scores as criteria in Engagement Studio and automation tools, and in the Insights section of a prospect record.

Considerations for Behavior Scoring

When you're using Einstein Behavior Scoring, keep these considerations in mind.

How Behavior Scoring Works

Einstein Behavior Scoring uses machine learning to uncover the most influential behavior signals across past and current prospect engagement. For each prospect, Einstein considers all types of prospect engagement activities, and identifies positive and negative interactions. An evolving Einstein scoring model weights each activity and assigns a score from 0 through 100.

Enable Einstein Behavior Scoring

To add behavior scores to lead and contact pages and list views in Salesforce, first enable Einstein Behavior Scoring for Account Engagement.

Einstein Behavior Scoring Dashboard for B2B Marketing Analytics

The Einstein Behavior Scoring dashboard provides a look into how Einstein uses engagement data to create its model. You can learn which engagement activities impact opportunities the most. Select an activity to learn more about which individual assets perform best.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise**, **Performance**, and **Unlimited** Editions

Considerations for Behavior Scoring

When you're using Einstein Behavior Scoring, keep these considerations in mind.

Setting Up Einstein Behavior Scoring

- Behavior Scoring works best in Salesforce orgs that contain a certain amount of data. We recommend at least 6 months of prospect engagement data and at least 20 prospects linked to opportunities.
- After you enable Einstein Behavior Scoring, it can take up to 48 hours for scores to become available. Prospects that are already connected to an opportunity when you enable the feature are used to train the model and don't receive scores.
- For orgs using the B2BMA Integration User and the most recent connector, behavior scores are available in Account Engagement by default, and you don't need to activate any permission sets. However, if you're using the original connector, assign the CRM User, Sales User, or Service User permission set to the connector user that you selected.

EDITIONS

Available in: Account Engagement **Advanced** Edition with Salesforce **Enterprise**, **Performance**, or **Unlimited** Editions

Using Einstein Behavior Scoring

- A prospect must have engagement activity from the past year to be scored.
- Einstein scores prospects linked to leads and contacts. Person accounts aren't supported.

- After you put a prospect in the recycle bin, Einstein has to scan and completely delete prospect data throughout its infrastructure. For best results, wait at least 24 hours to empty the recycle bin. Otherwise, backup processes that make sure that prospect data is deleted can take up to 10 days.
- If you have duplicate prospects, we don't combine scores. A behavior score is linked to the unique prospect ID.
- A lead or contact that's connected to multiple prospects in multiple business units can't be scored. A record that meets this criteria doesn't show a score in the Behavior Score Lightning component.
- Scores are typically updated every 4 hours. The more data you have, the longer it takes for scores to refresh.

Einstein Behavior Scoring Dashboard for Admins

- Using the Einstein Behavior Scoring dashboard requires Account Engagement Advanced Edition and the Sales Cloud User, Service Cloud User, or CRM User permission set license. Then, you can turn on Einstein for Account Engagement in Marketing Setup. If you select the Einstein Behavior Scoring dashboard without these settings, your B2B Marketing Analytics app can't be created.
- Einstein Behavior Scoring and B2B Marketing Analytics support using Data Sync for improved performance with multiple business units. If you previously turned off Data Sync due to lack of this support, you can safely turn it back on. However, if you use other CRM Analytics apps that filter synced objects, data availability can be limited in your B2B Marketing Analytics app. Find out how Data Sync works: [Understand What Happens When You Enable Data Sync and Connections](#).
- As with all CRM Analytics templated apps, the B2B Marketing Analytics app—and your Einstein Behavior Scoring dashboard—must be updated when new versions are made available. Any user can upgrade by clicking the **Upgrade now** link in the header of an app.
- The Analytics Integration User must have read access to the Account Engagement Campaign (`pi_campaign__c`) field on Lead and Contact objects.

Einstein Behavior Scoring Dashboard for Users

- When you have less data than the dashboard requires, the Influence by Asset widget is empty. After Einstein scans enough data to evaluate individual assets, the widget shows a bar chart.
- Although Einstein evaluates many factors, only a prospect's top four influencing factors are shown on the dashboard.
- Sometimes, after you click a factor on a graph, the related prospects table looks empty. This behavior is expected because of how the predictive model identifies each factor. Influential factors don't have prospects related to them at all times.
- The model is retrained and updated every 10 days, so model factors can change at this time.
- When you edit the Einstein Behavior Scoring data flow, the Fields section shows an error message. This behavior is expected.

How Behavior Scoring Works

Einstein Behavior Scoring uses machine learning to uncover the most influential behavior signals across past and current prospect engagement. For each prospect, Einstein considers all types of prospect engagement activities, and identifies positive and negative interactions. An evolving Einstein scoring model weights each activity and assigns a score from 0 through 100.

After you turn on Einstein Behavior Scoring, the model learns from the prospect activities and relationships it finds in your data. Prospects associated with opportunities that are created before you enable Behavior Scoring or that occur during the initial training period aren't scored.

Behavior Scoring uses your prospects' engagement pattern data to improve the model over time.

Frequency and recency are important factors, which are weighted and defined by activity type and asset. For example, the model could determine that an email open from last week more heavily impacts a prospect's score than a form submission from 90 days ago.

EDITIONS

Available in: Account Engagement **Advanced Edition** with Salesforce **Enterprise, Performance, or Unlimited Editions**

The model marks a prospect as converted when it's linked to an opportunity, and is no longer scored. This conversion is determined in three ways.

- A prospect's associated lead or contact is linked to an opportunity.
- A prospect's associated contact is used as an opportunity contact role.
- A prospect's lifecycle stage becomes Sales Qualified Lead.

Data Requirements

Einstein Behavior Scoring uses various data to develop its model. From Account Engagement, the model considers visitor activity, prospect lifecycle stage, and lifecycle history. From Salesforce, it analyzes the opportunity contact role and the lead and contact records that are connected to prospects.

When you first start set up Salesforce and Behavior Scoring, we use a baseline model. As you accumulate prospect engagement data, the model finds more patterns in your specific prospects and assets. To see these more tailored insights, your org must meet the following criteria.

- Six months of engagement data for connected prospects.
- At least 20 prospects linked to opportunities (determined by lifecycle stage or opportunity contact role).

Locations

- The Behavior Scoring Lightning component is available on lead and contact pages.
- The Einstein Behavior Scoring dashboard is available in the B2B Marketing Analytics app.

Rationales

In addition to providing a score, Einstein also surfaces what we call rationales. A rationale is a positive or negative statement that tells you more about why the prospect scored the way they did. For example, clicking a social post is typically positive, but doesn't necessarily mean that someone is ready to buy. Weight and sentiment can vary widely and the model changes along with your prospects' buying patterns. Here are a few more examples of the types of activities you can expect to see in rationales.

- Email opens
- File, form, video views
- Event registrations and check-ins
- Unsubscribes and resubscribes
- Spam complaints

Enable Einstein Behavior Scoring

To add behavior scores to lead and contact pages and list views in Salesforce, first enable Einstein Behavior Scoring for Account Engagement.

1. From Marketing Setup, in the Quick Find box, enter *Einstein*, and then select **Einstein Behavior Scoring**.
2. On the setup page, turn on the feature.
3. Add Einstein features to list views and pages.

You can place Einstein data in these places.

- Behavior Score column on Lead list view
- Behavior Score column on Contact list view
- Behavior Score card with insights on Lead Lightning pages.
- Behavior Score card with insights on Contact Lightning pages.
- Einstein Behavior Scoring dashboard in B2B Marketing Analytics, a CRM Analytics app.

To include Behavior Scoring only as criteria in workflow rules, Process Builder, Account Engagement automations, and Engagement Studio, complete steps 1 through 3 only. To see behavior scores in Account Engagement, assign the CRM User, Sales User, or Service User permission set to the connector user.

Other settings and licenses are required to use the optional Einstein Behavior Scoring dashboard in B2B Marketing Analytics.

Einstein Behavior Scoring Dashboard for B2B Marketing Analytics

The Einstein Behavior Scoring dashboard provides a look into how Einstein uses engagement data to create its model. You can learn which engagement activities impact opportunities the most. Select an activity to learn more about which individual assets perform best.

To use the Einstein Behavior Scoring Dashboard, an admin sets up Einstein Behavior Scoring. Then, any user with access to B2B Marketing Analytics can create or reconfigure an app to include the Einstein Behavior Scoring dashboard. Select it from the Optional Dashboards list during setup.

[Considerations for Einstein Behavior Scoring Dashboard](#)

Before you set up or use the Einstein Behavior Scoring dashboard, review the considerations.

[Set Up the Einstein Behavior Scoring Dashboard for B2B Marketing Analytics](#)

The Einstein Behavior Scoring dashboard brings intelligent data into your marketing app. To use the optional dashboard, set up Einstein and B2B Marketing Analytics.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise**, **Performance**, or **Unlimited** Editions

USER PERMISSIONS

To turn on and expose Einstein for Account Engagement features in a Salesforce org:

- Account Engagement Administrator role with Sales Cloud User, Service Cloud User, or CRM User permission set

To view Einstein for Account Engagement features on Salesforce Lightning pages:

- Sales Cloud User, Service Cloud User, or CRM User permission set

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Considerations for Einstein Behavior Scoring Dashboard

Before you set up or use the Einstein Behavior Scoring dashboard, review the considerations.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Considerations for Admins

- Using the Einstein Behavior Scoring dashboard requires Account Engagement Advanced Edition and the Sales Cloud User, Service Cloud User, or CRM User permission set license. Then, you can turn on Einstein for Account Engagement in Marketing Setup. If you select the Einstein Behavior Scoring dashboard without these settings, your B2B Marketing Analytics app can't be created.
- Einstein Behavior Scoring and B2B Marketing Analytics support using Data Sync for improved performance with multiple business units. If you previously turned off Data Sync due to lack of this support, you can safely turn it back on. However, if you use other CRM Analytics apps that filter synced objects, data availability can be limited in your B2B Marketing Analytics app. Find out how Data Sync works: [Understand What Happens When You Enable Data Sync and Connections](#).
- As with all CRM Analytics templated apps, the B2B Marketing Analytics app—and your Einstein Behavior Scoring dashboard—must be updated when new versions are made available. Any user can upgrade by clicking the **Upgrade now** link in the header of an app.
- The Analytics Integration User must have read access to the Account Engagement Campaign (`pi_campaign__c`) field on Lead and Contact objects.

Considerations for Users

- When you have less data than the dashboard requires, the Influence by Asset widget is empty. After Einstein scans enough data to evaluate individual assets, the widget shows a bar chart.
- Although Einstein evaluates many factors, only a prospect's top four influencing factors are shown on the dashboard.
- Sometimes, after you click a factor on a graph, the related prospects table looks empty. This behavior is expected because of how the predictive model identifies each factor. Influential factors don't have prospects related to them at all times.
- The model is retrained and updated every 10 days, so model factors can change at this time.
- When you edit the Einstein Behavior Scoring data flow, the Fields section shows an error message. This behavior is expected.

Set Up the Einstein Behavior Scoring Dashboard for B2B Marketing Analytics

The Einstein Behavior Scoring dashboard brings intelligent data into your marketing app. To use the optional dashboard, set up Einstein and B2B Marketing Analytics.

1. From Marketing Setup, enter *Einstein* in the QuickFind box, and then select **Einstein Account Engagement**.
2. Select **Einstein Behavior Scoring**.
3. Enable the feature, and then place the component on the pages where you want to show scores.
4. After you begin to get scores from Einstein, open Analytics Studio from the App Launcher.
5. Create an app.
If you already use B2B Marketing Analytics and want to add the Einstein Behavior Scoring dashboard to an app, click **Reconfigure** in the app header.
6. On the Optional Features step in the setup wizard, select **Einstein Behavior Scoring Dashboard**.
7. Save the app.

It can take time for the dashboard to start showing data. In the beginning, your dashboard contains information about a basic Einstein scoring model. As you accumulate engagement data, this model becomes more robust and shows asset-related insights.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise** Edition or higher

USER PERMISSIONS

To create B2B Marketing apps:

- B2B Marketing Analytics

To turn on and expose Einstein features:

- Account Engagement Administrator role with Sales Cloud User, Service Cloud User, or CRM User permission set

To create a B2B Marketing Analytics app:

- Manage CRM Analytics Templated Apps

AND

Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

To use B2B Marketing Analytics:

- Use CRM Analytics Templated Apps

AND

Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

Einstein Campaign Insights

Add Einstein Campaign Insights to your Lightning pages to learn what factors drive campaign performance. Einstein's intelligence can help you optimize campaign assets and find new audiences. Turn on the feature in Marketing Setup and add the Einstein Insights component to your Lightning pages.

Campaign Insights is available on Lightning Experience home pages and campaign record home pages. The insights reveal trends in prospect demographics and marketing asset engagement. Tracked marketing assets include list emails, marketing forms, and landing pages.

[Einstein Campaign Insights Considerations](#)

Before you set up Einstein Campaign Insights for Account Engagement, keep these considerations in mind.

[How Einstein Campaign Insights Works](#)

Einstein Campaign Insights uses Einstein machine learning to find data related to engagement activity, content, and audience characteristics to provide real-time insights about your running campaigns. Insights are updated up to every four hours, or when a new insight is detected.

[Enable Einstein Campaign Insights](#)

To make Einstein Campaign Insights visible in Salesforce, first enable the feature in Marketing Setup.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise**, **Performance**, and **Unlimited** Editions

Einstein Campaign Insights Considerations

Before you set up Einstein Campaign Insights for Account Engagement, keep these considerations in mind.

For best results, you need enough data to generate statistically significant insights.

- Make sure that Connected Campaigns is turned on.
- We recommend that you have at least 50 campaigns connected.

When you meet these criteria and set up Campaign Insights for the first time, it can take up to 24 hours for explanations to appear.

After you put a prospect in the recycle bin, the Einstein system scans and deletes prospect data throughout its infrastructure. For best results, wait at least 24 hours to empty the recycle bin. Otherwise, backup processes that make sure that prospect data is deleted can take up to 10 days.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise**, **Performance**, and **Unlimited** Editions

How Einstein Campaign Insights Works

Einstein Campaign Insights uses Einstein machine learning to find data related to engagement activity, content, and audience characteristics to provide real-time insights about your running campaigns. Insights are updated up to every four hours, or when a new insight is detected.

Campaign Insights analyzes engagement with your marketing assets, and finds themes among your prospects. Each insight includes a label and supporting rationales, which provide specific prospect engagement data relative to a baseline. The rationales can be engagement-specific, or a combination of how audience segments interact with specific assets or asset types.

EDITIONS

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Data Origin

Campaign Insights uses these data points to identify segments and trends.

- Job Title
- Industry
- Prospect Country
- Prospect State
- Engagement Data
 - Emails: Open and Click
 - Landing Pages: Views and Submissions
 - Forms: Views and Submissions

When a prospect record doesn't contain values in these fields, the insights model explores associated lead, contact, and account records for the missing information. The model returns insights only when it can detect at least one connected campaign.

Insight Locations

Campaign Insights are available Lightning home and campaign record home pages. Although the insights appear in the Sales Cloud, almost all data used in the model originates in Account Engagement.

In addition to seeing insights on individual records, you can create a custom report that helps you pinpoint new trends across your content and audiences. To see all the insights Einstein generates and to learn more about the efficacy of your campaigns, build a report from these available fields.

- Campaign ID
- Activity Type
- Sentiment
- Asset Field 1 (Email Subject)
- Marketing Asset ID (or Name)
- Campaign Insight ID
- Parent ID
- Email Address
- Title Phrase
- Country
- State
- Job Title
- Industry

Insight Types

The Campaign Insights model generates global and segment insights.

Global insights consider the performance of a specific campaign or asset among other records of the same type. For example, the Let's Get Social Webinar signup form submissions outperformed your other forms. Segment insights tell you even more, by shining a light on which audiences tend to engage with certain campaigns or assets. For example, Business Coordinators in New Jersey submitted your sign-up form less than other segments.

In either case, the Campaign Insights model looks for anomalous behavior—either higher than usual or lower than usual—and provides that information in a human-readable format.

Enable Einstein Campaign Insights

To make Einstein Campaign Insights visible in Salesforce, first enable the feature in Marketing Setup.

1. From Marketing Setup, in the Quick Find box, enter *Einstein*, and then select **Einstein Campaign Insights**.
2. On the setup page, turn on the feature.
3. Decide where to place Einstein features, and update your layouts in the Lightning App Builder.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise**, **Performance**, or **Unlimited** Editions

USER PERMISSIONS

To turn on and expose Einstein for Account Engagement features in a Salesforce org:

- Account Engagement Administrator role with Sales Cloud User, Service Cloud User, or CRM User permission set

To view Einstein for Account Engagement features on Salesforce Lightning pages:

- Sales Cloud User, Service Cloud User, or CRM User permission set

Einstein Attribution

Einstein Attribution combines Campaign Influence with Einstein's intelligent analysis to more accurately assign campaign attribution. Instead of choosing a model before you start reporting, you can use Einstein Attribution to analyze historical campaigns and find emerging patterns. Einstein allocates conversion credit to multiple campaigns, so you can see which campaigns are most effective at generating pipeline.

Attribution values appear where you're used to seeing Campaign Influence: reports, dashboards, and related lists on campaigns and opportunities. To learn more about how Einstein determines the attribution model, open the Multi-Touch Attribution dashboard in B2B Marketing Analytics.

[Considerations for Einstein Attribution](#)

Einstein Attribution relies on certain data and some other Salesforce features. Make sure you have the correct setup before you begin.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise**, **Performance**, or **Unlimited** Edition

[How Einstein Attribution Works](#)

The Einstein Attribution model is based on a concept borrowed from cooperative game theory called the Shapley Value. The Shapley Value calculates the contribution of each player in a cooperative game, where players use different skill sets to achieve a collective reward. We adapt this method for marketing attribution by distributing an opportunity amount among the campaigns that are associated with the opportunity.

[Set Up Einstein Attribution](#)

Einstein Attribution relies on Connected Campaigns and Customizable Campaign Influence to work properly. It can take some time to configure and map your connected campaigns, so make sure that's complete before you enable Einstein Attribution.

[Explore Einstein Attribution in B2B Marketing Analytics](#)

Attribution results appear in Campaign Influence related lists and reports. Still, it can be helpful to see these values in aggregate and identify trends across campaigns and engagement activities. Inside the Multi-Touch Attribution dashboard of the B2B Marketing Analytics app, you can interpret this data through different models, including the Einstein Attribution Data-Driven Model.

Considerations for Einstein Attribution

Einstein Attribution relies on certain data and some other Salesforce features. Make sure you have the correct setup before you begin.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise**, **Performance**, or **Unlimited** Edition

Prerequisites for Einstein Attribution

- Verify that you're using the standard Opportunity object and that you have values in the Close Date and Amount fields.
- To get started, Einstein needs data from at least 100 opportunity contact roles (OCRs) that you have defined.
- Connect Account Engagement and Salesforce Campaigns.
- Enable and configure Campaign Influence.

Other Things to Know

- Einstein Attribution considers data from both Account Engagement and Salesforce and removes duplicates for you.
- You can change the Campaign Influence Time Frame at any time, but when you change it, results are likely to change.
- When you use the Data-Driven Model as your default Campaign Influence model, select **Records with >0% attribution** in the Record Preference dropdown.
- We recommend that you don't edit or delete campaign influence records created by the Data-Driven Model via the API. Your changes are overwritten each time the model is recalculated.
- If someone deletes or deactivates the opportunity stage used as the success milestone, the Data-Driven Model stops running and an error appears on the Einstein Attribution Setup page.

How Einstein Attribution Works

The Einstein Attribution model is based on a concept borrowed from cooperative game theory called the Shapley Value. The Shapley Value calculates the contribution of each player in a cooperative game, where players use different skill sets to achieve a collective reward. We adapt this method for marketing attribution by distributing an opportunity amount among the campaigns that are associated with the opportunity.

Einstein uses your historical data to identify common journeys that users take. It scans a collection of campaigns that influenced an opportunity and assigns a marginal contribution amount to each touchpoint. The model averages that amount across every possible sequence of touchpoints. This sequencing allows the model to identify a more accurate contribution amount, instead of just reiterating a touchpoint's position in the journey.

EDITIONS

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Analyzing Touchpoints

Touchpoints include tracked engagement activities on an Account Engagement prospect or a Sales Cloud campaign member. An engagement activity is one that represents a person's interest, for example an email open, email click, form submission, or event attendance.

Campaign members whose status is Responded are included in the model. However, since attribution also uses Account Engagement visitor activities in its calculations, it's possible for records to appear in reports whose status isn't Responded. The report doesn't contain Account Engagement activities that are tracked but that don't indicate engagement, such as invitations and sent emails.

Associating Campaigns

Sales Cloud often uses the Opportunity Contact Role to link campaigns and opportunities. However, users don't always create this reference, which means you don't get all the campaign attribution data you need.

To fill this gap, Einstein Attribution creates virtual opportunity contact roles for use in its models. We analyze tasks, emails, and events on your opportunities, and then we extract the contacts who are involved in them. If that isn't sufficient, we extrapolate relationships via a prospect's email domain. These methods reveal more relationships and provide more data, but you don't have to change anything.



Note: Although Einstein Attribution works with Campaign Influence object, the attribution model doesn't use any auto-association rules that have been set up.

Tuning the Model

Two tuning settings are available to help you align Einstein Attribution to your business: time frame and success milestone. By default, the model scans campaign and opportunity relationships up to 6 months prior to opportunity creation.

With time frame, you identify the period to track prospect and campaign member activities. The success milestone setting allows you to choose an active opportunity stage, which indicates that an opportunity is successful, or converted. The Data-Driven Model considers all journeys that reached that success milestone and identifies the contribution of each campaign along the way.



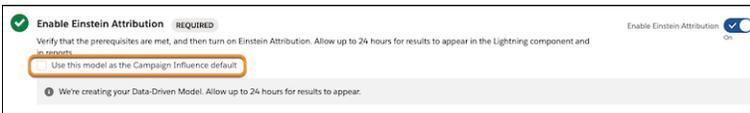
Example: To find out what's most effective in encouraging annual renewals, you might set the time frame to 12 months and select a custom stage, such as Renewed.

Set Up Einstein Attribution

Einstein Attribution relies on Connected Campaigns and Customizable Campaign Influence to work properly. It can take some time to configure and map your connected campaigns, so make sure that's complete before you enable Einstein Attribution.

Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

1. From Marketing Setup, enter *Einstein* in the Quick Find box, and then select **Einstein Attribution**.
2. Verify that Connected Campaigns is on and that campaigns are syncing.
3. To enable Customizable Campaign Influence and Einstein Attribution, follow the prompts in the Setup Assistant.
These steps create an attribution model called Data-Driven Model. To view the results of this model, look at Salesforce reports or the Multi-Touch Attribution dashboard in B2B Marketing Analytics.
4. To use the Data-Driven Model as the default Campaign Influence model, select **Use this model as the Campaign Influence default**.



If you already use Customizable Campaign Influence, the fields on your Campaign Influence related lists are updated with most of the Einstein Attribution data. To include the Lead ID field, edit the related list in Page Layouts and select it from the Available Fields.

5. To limit which asset activities are considered over time, select a value in the Campaign Influence Time Frame dropdown.
6. To customize how the model identifies a conversion, select an active opportunity stage in the **Success Milestone** dropdown menu.

After you enable Einstein Attribution, it can take up to 24 hours for results to become available. Results appear in the Customizable Campaign Influence related lists, which are available for campaign and opportunity records. To explore results from Einstein Attribution, set up the Multi-Touch Attribution dashboard in your B2B Marketing Analytics app.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To turn on and expose Einstein features in Account Engagement:

- Account Engagement Administrator role with Sales Cloud User, Service Cloud User, or CRM User permission set

Explore Einstein Attribution in B2B Marketing Analytics

Attribution results appear in Campaign Influence related lists and reports. Still, it can be helpful to see these values in aggregate and identify trends across campaigns and engagement activities. Inside the Multi-Touch Attribution dashboard of the B2B Marketing Analytics app, you can interpret this data through different models, including the Einstein Attribution Data-Driven Model.

1. Create a B2B Marketing Analytics app.
2. On the Optional Feature step, select **Multi-Touch Attribution Dashboard**.
3. After configuration is complete, open the Multi-Touch Attribution Dashboard.
4. In the Model dropdown, select **Data-Driven Model**.

From here, you can create and explore widgets or create lenses to share with colleagues. If you make changes to attribution settings, such as time frame or success milestone, it can take up to 24 hours to update the values on this dashboard.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise, Performance, or Unlimited** Edition

USER PERMISSIONS

To create a B2B Marketing Analytics app:

- Manage Analytics Templated Apps AND Create B2B Marketing Analytics Apps
- OR
- B2B Marketing Analytics permission set

Optimize Send Times with Einstein

When you're ready to send a list email, boost prospect engagement with the power of AI. Einstein evaluates historical email engagement data in Account Engagement to recommend an optimal send time for the individual prospects on your lists.

[How Einstein Send Time Optimization Works](#)

Einstein evaluates historical email engagement data to recommend an optimal send time for the individual prospects on your lists.

[Set Up Einstein Send Time Optimization](#)

Enable Einstein Send Time Optimization in one click, and give the model time to learn about your prospects.

[Send an Einstein Optimized Email](#)

When you choose Einstein Optimized sending, select a time frame for sending emails. During that period, Einstein's model evaluates the best time to send for each prospect and handles each delivery for you.

[Find Optimized Email Reports](#)

After you schedule an Einstein Optimized email, you can open its email report from the success message at the top of the screen. When you dismiss the message, you can access the report from the Account Engagement Email tab. After the email starts its sending period, the report appears in the Account Engagement Reports tab.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Professional, Enterprise, Performance, and Unlimited** Editions

How Einstein Send Time Optimization Works

Einstein evaluates historical email engagement data to recommend an optimal send time for the individual prospects on your lists.

Data Usage and Requirements

To optimize email sends, Einstein evaluates engagement behavior from your prospects. Evaluated metrics include sends, opens, clicks, unsubscribes, spam complaints, and their associated timestamps. We also weigh metadata on the frequency of your email sends. Einstein doesn't consider demographic data, email content, or any data purchased or collected from third parties.

To build your model, we use marketing email send data only. Marketing email includes list email sends, and emails sent through Engagement Studio and Salesforce Engage. Data from emails marked operational isn't used to build your Einstein Send Time Optimization model.

Einstein Send Time Optimization requires 90 days of email engagement metrics for each prospect.

How It Works

When you turn on Einstein Send Time Optimization, the model starts to evaluate your prospects' email engagement data. To be considered by the model, a prospect must have at least one engagement activity in the past 90 days. Optimization results improve when more engagement activities fall within that 90-day period. If a prospect is new or hasn't engaged with you recently, Einstein selects a randomized send time recommendation. The recommended time is based on your customers' aggregate email engagement data.

Each time you select an Einstein Optimized email send in the enhanced email experience, the prospect's email address goes into Einstein's most recently updated model. The model determines an ideal send time for that individual prospect. Account Engagement saves the recommendation as a scheduled send time and adds the prospect to a sending queue. To take advantage of the most recent engagement data, we repeat this process every time you send an Einstein Optimized email.

 **Example:** Angelica wants to send a webinar invitation to 100 prospects. The webinar takes place on March 11, and RSVPs are needed by March 1. She wants to allow the maximum time frame for sending and still provide time for replies to come in. She sets the start time for February 15 at 7 AM and the time frame for 168 hours.

That morning, Einstein evaluates available data and identifies recommended send times for 93 prospects. The remaining 7 prospects didn't have enough historical data for Einstein to identify an optimized time, so a randomized recommended send time is used. Throughout the week, Angelica checks the email report to see how many have been sent and already opened. She can also find the number of remaining emails queued for their send time.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Set Up Einstein Send Time Optimization

Enable Einstein Send Time Optimization in one click, and give the model time to learn about your prospects.

Einstein Send Time Optimization isn't available for classic emails. Before you set up Einstein Send Time Optimization, set up the enhanced email experience in Marketing Setup in Salesforce. If your connector doesn't use the default B2BMA Integration User, assign the [Modify Metadata Through Metadata API Functions](#) system permission to the connector user in Salesforce.

1. From Marketing Setup, in the Quick Find box, enter *Einstein*, and then select **Einstein Send Time Optimization**.

2. Click **Activate**.

Allow up to 72 hours to create your custom Einstein model.

During the model training period, the Einstein Optimized tab in the email experience shows a temporary message. When it's ready to use, the send time optimization form appears.

When you deactivate the feature, we delete all of the data previously used by the model. If you want to deactivate the feature, return to the setup screen and click **Deactivate**. The next time you activate Einstein Send Time Optimization, users must wait for another training period to build a new model.

Send an Einstein Optimized Email

When you choose Einstein Optimized sending, select a time frame for sending emails. During that period, Einstein's model evaluates the best time to send for each prospect and handles each delivery for you.

Einstein Send Time Optimization isn't available for classic emails in Account Engagement.

1. From the email content record, click **Send**.

2. Select **Einstein Optimized**.

3. Enter the time frame for sending optimized emails.

- a. Enter the date and time when you want sending to begin.



Tip: It takes an hour for Einstein to identify the ideal sending times for each prospect. We recommend that you select a time that's earlier than you want emails to begin arriving.

- b. Enter the number of hours, between 3 and 168, during which sending can take place.

4. Click **Schedule Send**.

Email reports for optimized emails are saved with other emails in Account Engagement Reports, but aren't available until the email's start time. To find them, open the Account Engagement Email tab and filter by Scheduled. The number of queued emails is available on the report. Click the value to see a list of prospects alongside the scheduled send times that Einstein recommended.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To activate Einstein Send Time Optimization in Account Engagement:

- Customize Application

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To send Einstein Optimized emails:

- Manage Email Content
AND
Email Send to List
AND
View Lists
AND
View Campaigns

Find Optimized Email Reports

After you schedule an Einstein Optimized email, you can open its email report from the success message at the top of the screen. When you dismiss the message, you can access the report from the Account Engagement Email tab. After the email starts its sending period, the report appears in the Account Engagement Reports tab.

1. Open the **Account Engagement Email** tab, and click **Scheduled**.
2. Select **All Scheduled Builder Emails** from the filter dropdown.
3. Select the Einstein Optimized email you want to open, and click **View Report** on the detail page.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To view Einstein Optimized email reports:

- Manage Email Content
- AND
- View Lists
- AND
- View Campaigns

Einstein Key Accounts Identification for Account Engagement

Einstein's AI helps you identify candidates for your account-based marketing efforts. It creates a scoring model based on your previous opportunity creation data and provides a tier ranking for individual accounts. You can use the account tier to target ideal prospects in engagement programs, automation rules, and dynamic lists. In addition, account attributes and engagement metrics are included as insights to help you focus your plans.

[Considerations for Einstein Key Accounts Identification](#)

Before you work with Einstein Key Accounts Identification, review these considerations.

[How It Works](#)

Einstein Key Accounts Identification handles the selection phase of your account-based marketing efforts by offering two values: a tier ranking and key factors.

[Set Up Einstein Key Accounts Identification](#)

Turn on Einstein Key Accounts Identification in Marketing Setup, and tell users that they can add the Einstein Account Tier field to their list views or custom reports.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise**, **Performance**, or **Unlimited** Edition

Considerations for Einstein Key Accounts Identification

Before you work with Einstein Key Accounts Identification, review these considerations.

- The training period for Einstein Key Accounts Identification can last up to 72 hours. The model continues to learn as data is updated.
- Account tiers and insights don't work with person accounts. When the Einstein component appears on a person account page, it shows an error.
- The Einstein Key Account component can show up to four key factors at a time.
- To see tier rankings in a list view, an admin can create a public list view that includes the Einstein Account Tier field. Field-level security is set to visible by default, so users can also add the field to their preferred list views.
- The Einstein Account Tier field shows the value Not Available until enough data is available and a tier has been assigned.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise**, **Performance**, or **Unlimited** Edition

How It Works

Einstein Key Accounts Identification handles the selection phase of your account-based marketing efforts by offering two values: a tier ranking and key factors.

Building Your Model

To build your model, we start with historical data about your accounts and when an associated opportunity was created. Einstein looks for patterns among your accounts' engagement data and related objects to identify attributes, or key factors that are most impactful on a successful outcome.

We also use data from our company enrichment repository to fill in gaps where your account records are missing information, such as company size or industry. The repository is populated with publicly available information from websites, including company sites. We combine this data with yours to optimize the types of relationships the model can identify.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise**, **Performance**, or **Unlimited** Edition

Displaying Results

The Einstein Key Accounts card appears on an account record and contains a few important pieces of information. When the model identifies correlations among your accounts and their predicted outcomes, the card is updated.



Account Tier

An account's tier ranking (1) is based on the uplift value determined by your data and custom model only. That is, tier sizes and criteria aren't standard, and vary from org to org. In addition, the model continues to learn from new data, so tier ranking and uplift value can change over time.

A tier can be A, B, C, or D, where A indicates the highest likelihood of success.

To use the account tier field as a filter in your automation rules, dynamic lists, and engagement programs, an admin must first configure it as a custom field in Account Engagement.

Uplift Value

The number value (2) is called an uplift value. This value is assigned per tier and suggests the account's likelihood of conversion. In Einstein Key Accounts Identification, conversion is based on whether an opportunity is created on an account within the next 6 months.

The uplift value compares the chances of conversion between an account in the given tier versus a randomly selected one. An uplift value that's greater than 1 tells you that it's more likely to convert an account in the given tier than a random account. A value of less than 1 indicates that the accounts in the tier are less likely to convert compared to others.

Contribution Factors

A robust model can provide up to four contribution factors (3). In most cases, at least one contribution factor appears on the card. When the area is blank, the model hasn't yet identified a key factor that influences conversion more significantly than any others.

Data Requirements and Usage

Einstein Key Accounts Identification requires positive and negative account data. For best results, we recommend that you have at least 200 accounts with won opportunities and 200 accounts with lost opportunities from the last 2 years.

The Einstein Key Accounts Identification model scans for signals on fields from objects such as the ones listed here.

- Account
- Contact
- Currency Type
- Event
- Lead
- Opportunity
- Opportunity Contact Role
- Opportunity Line Item
- Prospects
- Visitor Activities
- Pricebook Entry
- Task

Set Up Einstein Key Accounts Identification

Turn on Einstein Key Accounts Identification in Marketing Setup, and tell users that they can add the Einstein Account Tier field to their list views or custom reports.

User permissions with an asterisk must be enabled in the order listed.

1. From Marketing Setup, enter *KEY* in the Quick Find box, and then select **Einstein Key Accounts Identification**.
2. Turn on the feature.
3. From Object Manager, open the Account object, and add the Einstein Account Tier field to the page layouts.
4. Use the Lightning App Builder to place the Einstein Key Accounts component on account records.
5. To show Einstein tier rankings on list views, create a public list view that includes the Einstein Account Tier field.

Field-level security for Einstein Account Tier defaults to Visible, so users can add the field to their own list views.

It can take up to 72 hours for an account tier to appear on the card.

EDITIONS

Available in: Account Engagement **Advanced** and **Premium** Editions with Salesforce **Enterprise**, **Performance**, or **Unlimited** Edition

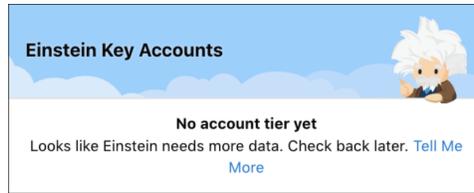
USER PERMISSIONS

To turn on and show Einstein for Account Engagement features in Salesforce:

- Account Engagement Administrator role with Sales Cloud User, Service Cloud User, or CRM User permission set

To view Einstein Key Accounts component:

- Salesforce Administrator
- OR
- View AI Insight Objects system permission *
- and
- ViewMLModels system permission *
- and
- Read on Accounts object setting *
- and
- Read on AI Record Insights object setting *
- and
- Read on AI Record Insight Reasons object setting *



The Einstein Account Tier field is available for use in custom reports.

Einstein Features in Account Engagement FAQ

You might still have a few questions about how Einstein features work, or how they differ from one another.

EDITIONS

Available in: Account Engagement **Advanced** Edition with Salesforce **Enterprise, Performance, or Unlimited** Editions

What's the difference?

What's the difference between Einstein Behavior Scoring and Einstein Lead Scoring?

The two features look at people in two different funnel areas. Einstein Behavior Scoring looks only at prospects and Einstein Lead Scoring looks only at leads. During the marketing phase, Einstein Behavior Scoring shows how a prospect's marketing engagement measures up to other prospects who are ultimately linked to opportunities. Later, Einstein Lead Scoring uses lead conversion pattern data to score leads, so reps know where to focus their deal-closing efforts.

What's the difference between Einstein Behavior Scoring and the Prospect Score in Account Engagement?

The Prospect Score is a score determined by static factors and weights, which are set by default or edited by an Account Engagement admin. Einstein Behavior Scoring uses a dynamic scoring model, which changes over time as it learns to more accurately score prospects' interest in your company. Behavior scores also consider frequency, recency, and lag among activities. These two resulting scores can differ from one another, because they're calculated by different models.

What's next?

Does Einstein Behavior Scoring replace the Prospect Score?

No. Because the scores are calculated differently, you may find value in using both scoring models.

Can Einstein features be customized in Account Engagement?

Most Account Engagement Einstein features aren't manually customizable. Campaign Attribution allows you to specify a time period and success milestone.

Resources

Looking for more? Check out these resources.

- Trailhead: [Einstein Basics for Account Engagement Lightning App](#)