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# Pardot Einstein Features Implementation Guide

Salesforce, Winter '21





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# PARDOT EINSTEIN: SCORING AND INSIGHTS

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

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## EDITIONS

Available in: Pardot

**Performance**, and  
**Unlimited** Editions

### [Enable Pardot Einstein Features](#)

To make Pardot Einstein intelligence visible in Salesforce, enable the features you want in Salesforce Setup.

### [Einstein Behavior Scoring](#)

Einstein Behavior Scoring identifies prospects whose behavior suggests that they are ready to buy, and scores them based on Einstein's engagement model. After you turn on the feature in 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 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.

### [Einstein Features in Pardot FAQ](#)

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

### [Resources](#)


Looking for more? Check out these resources.

## Enable Pardot Einstein Features

To make Pardot Einstein intelligence visible in Salesforce, enable the features you want in Salesforce Setup.

1. From Setup, in the Quick Find box, enter *Einstein*.
2. Open **Einstein Pardot**, and then select the name of the feature you want to enable.
3. On the setup page, turn on the feature.
4. Decide where to place Einstein features, and update your layouts in the Lightning App Builder.

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

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

### EDITIONS

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

### USER PERMISSIONS

To turn on and expose Pardot Einstein features in a Salesforce org:

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

To view Pardot Einstein features on Salesforce Lightning pages:

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

## Einstein Behavior Scoring

Einstein Behavior Scoring identifies prospects whose behavior suggests that they are ready to buy, and scores them based on Einstein's engagement model. After you turn on the feature in 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 Pardot prospect record.

### [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 Pardot 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.

### [Considerations for Behavior Scoring](#)

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

### EDITIONS

Available in: Pardot **Advanced** Edition with Salesforce **Enterprise**, **Performance** and **Unlimited** Editions

### [The 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.

## 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 Pardot 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.

Behavior Scoring uses your prospects' engagement pattern data to improve the model over time. Frequency and recency are important factors, weighted and defined by activity type and asset. For example, an email click made in the last 7 days may more heavily impact a prospect's score than a click from 90 days ago.

### EDITIONS

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

## Data Requirements

Einstein Behavior Scoring uses various data to develop its model. From Pardot, 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 Pardot 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

## 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 six 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.
- Behavior scores are available inside Pardot by default for orgs using the B2BMA Integration user. 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: Pardot **Advanced** Edition with Salesforce **Enterprise**, **Performance**, or **Unlimited** Editions

### Using Einstein Behavior Scoring

- A prospect must have Pardot engagement activity in the past year to be scored.
- 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 Pardot prospect ID.
- A lead or contact that's connected to multiple Pardot 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 updated every 4 hours.

### Einstein Behavior Scoring Dashboard for Admins

- Using the Einstein Behavior Scoring dashboard requires a Pardot Advanced edition and the Sales Cloud User, Service Cloud User, or CRM User permission set license. Next, turn on Pardot Einstein in Salesforce Setup. If you select the Einstein Behavior Scoring dashboard without these settings, your B2B Marketing Analytics app cannot 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 Einstein 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 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 Pardot 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. To find other activities, check out Pardot's Engagement History tools: [Use Engagement History](#).



- Sometimes, after you click one of the factors on a graph, the associated prospects table looks empty. This behavior is expected, because of how the predictive model identifies each factor. Influential factors don't have prospects associated 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 dataflow, the Fields section shows an error message. This behavior is expected.

## The 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, make sure that you 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 this optional dashboard, make sure that your Salesforce org and users have the correct access.

#### EDITIONS

Available in: Lightning Experience in **Pardot Advanced** with Salesforce **Enterprise, Performance, and Unlimited** Editions

## Considerations for Einstein Behavior Scoring Dashboard

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

### Considerations for Admins

- Using the Einstein Behavior Scoring dashboard requires a Pardot Advanced edition and the Sales Cloud User, Service Cloud User, or CRM User permission set license. Next, turn on Pardot Einstein in Salesforce Setup. If you select the Einstein Behavior Scoring dashboard without these settings, your B2B Marketing Analytics app cannot 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 Einstein 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 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 Pardot Campaign (`pi_campaign__c`) field on Lead and Contact objects.

#### EDITIONS

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

### 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. To find other activities, check out Pardot's Engagement History tools: [Use Engagement History](#).

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- The model is retrained and updated every 10 days, so model factors can change at this time.
- When you edit the Einstein Behavior Scoring dataflow, 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 this optional dashboard, make sure that your Salesforce org and users have the correct access.

To use the optional dashboard, you must set up Pardot Einstein and B2B Marketing Analytics.

1. From Setup, enter *Einstein* in the QuickFind box, and then select **Einstein Pardot**.
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: **Pardot Advanced** Edition with Salesforce **Enterprise**, **Performance**, and **Unlimited** Editions

### USER PERMISSIONS

To create B2B Marketing apps:

- B2B Marketing Analytics

To turn on and expose Pardot Einstein features:

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

To create a B2B Marketing Analytics app:

- Manage Analytics Templated Apps

AND

Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

To use B2B Marketing Analytics:

- Use 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 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.

### [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.

### [Einstein Campaign Insights Considerations](#)

Before you set up Campaign Insights, keep these considerations in mind.

#### EDITIONS

Available in: Pardot  
**Advanced** Edition 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

Available in: Pardot  
**Advanced** Edition with  
Salesforce **Enterprise**,  
**Performance**, and  
**Unlimited** Editions

## 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.

## 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 Pardot.

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
- Insights Type
- Trend Type
- Asset Field 1 (Email Subject)
- Marketing Asset ID (or Name)
- Campaign Insight ID
- Parent ID
- Insights Type
- 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.

## Einstein Campaign Insights Considerations

Before you set up Campaign Insights, 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: Pardot  
**Advanced** Edition with  
Salesforce **Enterprise**,  
**Performance**, and  
**Unlimited** Editions

## 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.

### [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.

### [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.

### [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.

#### EDITIONS

Available in: Pardot **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.

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

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

## Analyzing Touchpoints

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

Only campaign members whose status is Responded are included in the model. We filter out 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.

## 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: Pardot  
**Advanced** and **Premium**  
Editions with Salesforce  
**Enterprise, Performance, or**  
**Unlimited** Edition

### Prerequisites for Einstein Attribution

- Verify that you are 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 Pardot Campaigns to Salesforce Campaigns.](#)
- Enable and configure [Customizable Campaign Influence.](#)

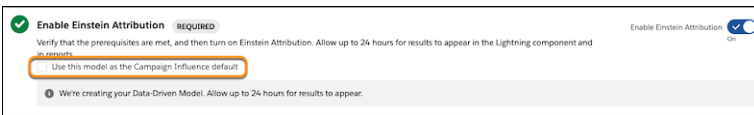
### Other Things to Know

- Einstein Attribution considers data from both Pardot 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-Drive Model stops running and an appears error on the Setup page.

## 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.

1. From Setup, in the Quick Find box, enter *Einstein Pardot*, 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 Einstein Attribution data.

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: Pardot **Advanced** and **Premium** Editions with Salesforce **Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To turn on and expose Pardot Einstein features in Salesforce:

- Pardot 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: Pardot **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

## Einstein Features in Pardot FAQ

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

### 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 Pardot Prospect Score?

The Pardot Prospect Score is a score determined by static factors and weights, which are set by default or edited by a Pardot 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 are calculated by different models.

### What's next?

#### Will Einstein Behavior Scoring replace the Pardot Prospect Score?

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

#### Can Pardot Einstein features be customized?

### EDITIONS

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



As of the Winter '20 release, Pardot Einstein Features (Behavior Scoring and Campaign Insights) are not customizable.

## Resources

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Looking for more? Check out these resources.

- Trailhead: [Einstein Basics for Pardot Lightning App](#)
- [Summer '19 Release Notes](#)
- [Winter '20 Release Notes](#)