Predictive AI Data Prep Checklist and Considerations

Use this checklist to plan your data strategy for predictive AI. The considerations listed below can vary by use case and business needs.

1. Determine Goal
2. Use Cases
3. Get to Know Data Cloud
4. Ethical Use of Data
5. Data Sources
6. Analyze Data
7. Data Model Requirements
8. Connect and Map
9. Predictive Model
10. Cleanse and Transform
11. Test Data
12. Brainstorm

1 Determine the Goal

- [ ] Determine the business outcome that you want to achieve
  - [ ] Complete the AI Strategy Trailhead module.
- [ ] Get familiar with predictive AI features.
  - [ ] Complete the Machine Learning Predictions: Quick Look Trailhead module.
  - [ ] Complete the Build AI Models in Einstein Studio Trailhead module.

2 Define Your Use Case(s)

Align your use case to the AI capabilities that can help you achieve your goal.

- [ ] Explore Use Cases for Predictive AI Solutions.

USE CASE	ASSOCIATED SYSTEMS	ASSOCIATED STAKEHOLDERS	NOTES

Examples:
- Prioritize leads based on their likelihood to convert.
- Automate case routing to determine the best team to handle incoming cases.

3 Get to Know Data Cloud

- [ ] Complete the Data Cloud-Powered Experiences Trailhead module.
- [ ] Review the standard Data Cloud permission sets.
- [ ] Review permissions to manage your AI models.
- [ ] Understand data usage types that impact Data Cloud billing.
- [ ] Understand Data Cloud Limits and Guidelines.
- [ ] Understand unstructured data in Data Cloud.

4 Understand Ethical Use of Data

- [ ] Complete the Ethical Data Use Best Practices: Quick Look Trailhead module.
- [ ] Understand ethics, privacy, and consent and its impact on customer data usage.

5 Identify Data Sources and Integrations

- [ ] Consider data types and formats, including the structure of date/time data types.
- [ ] Identify your data sources and datasets.
- [ ] Evaluate the use of connectors to bring in data.
    - [ ] Complete the Data Cloud Connectors and Integrations Trailhead module.

6 Analyze Your Data

- [ ] Create a data inventory to help you manage diverse data assets.
  - [ ] See Data Fundamentals for AI.
- [ ] Review data sources and audit data.
  - [ ] Review the Data Quality Trailhead module.
  - [ ] Evaluate data quality. Consider duplication, missing values, outliers, inconsistencies, and other data issues.
  - [ ] Determine the scope of relevant historical data.
- [ ] Identify a training dataset.

7 Understand Data Model Requirements

- [ ] Complete the Customer 360 Data Model for Data Cloud Trailhead module.
- [ ] Learn about data model concepts and what to consider when building a data model.
- [ ] Learn about data model objects (DMOs) in Data Cloud Reference Guide.
- [ ] Understand data model subject areas.
- [ ] Understand mapping requirements.

8 Connect and Map Data

- [ ] Connect data sources.
- [ ] Map data sources to data model objects.

9 Define Predictive Model Variables

- [ ] Define what variables to use in your model, as well as the granularity and scope of the data.
- [ ] Define what you want to predict. For example, in a lead conversion example, your model would predict the value of the lead conversion status variable.

10 Cleanse and Transform Data

- [ ] Resolve data quality issues such as cleanliness, relevance, ethics, bias, and efficiency.
    - [ ] Learn more in Data Cleansing and Preparation.
- [ ] *Optional*: Create variables by aggregating engagement or activity data with a batch data transform or calculated insights.

11 Test Your Data

- [ ] Understand best practices to improve your model quality.
- [ ] Determine if you need to use a standard data kit to package your objects and connected model(s) for testing in other Salesforce orgs.

  Note: Models created from scratch can be tested in a sandbox org. When you're satisfied with the results, use a DevOps data kit to move your objects and model(s) to a production org for deployment.

12 Brainstorm How to Operationalize Your AI Models

Operationalize your predictive models by integrating them into you business processes so they can provide actionable insights and drive decision-making.

- [ ] Review Get Predictions, Presctiptions, and Top Predictors to learn how to put your models to use.
- [ ] Get hands-on in the Predictive Outputs from Model Builder Trailhead module.

With your data strategy defined and data prepared, you're ready to build your predictive AI solution! Explore more in the Use AI Models.