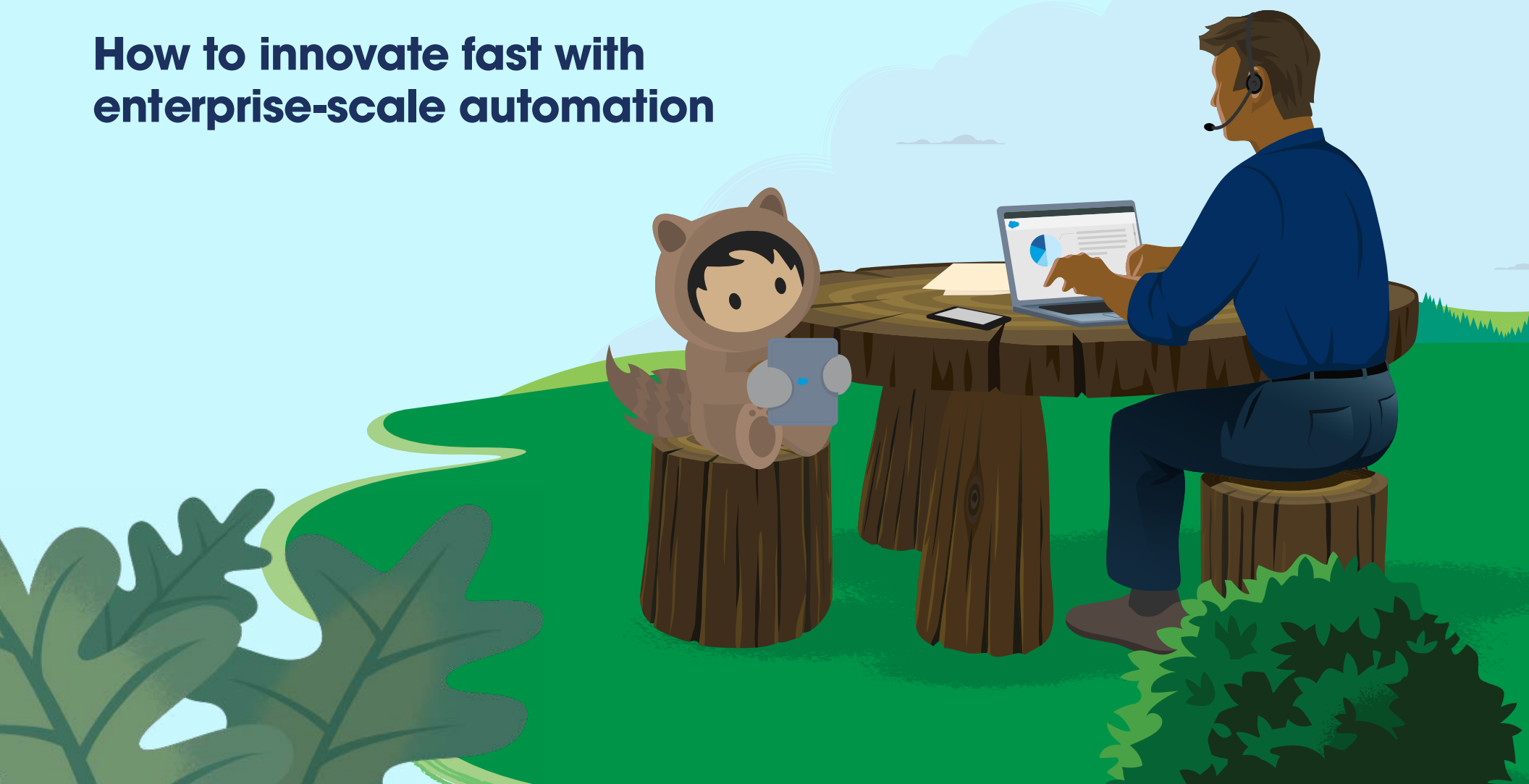EINSTEIN AUTOMATE:

SALESFORCE FLOW PLAYBOOK

How to innovate fast with enterprise-scale automation

Contents

Discover the Power of Automation

Automation and streamlining work have never been more relevant. In a changing world, finding new ways to work is essential, and there is a real need to go digital, fast. Automation helps your business succeed in its digital transformation both for employees and customers alike. This is where Salesforce's end-to-end workflow automation solution, Einstein Automate, comes in. Einstein Automate combines the power of business process automation, easy integration, and prebuilt industry process libraries so companies can build intelligent workflows with data from across any system.

At the core of an intelligent workflow is the ability to map out business rules and automate actions. From the simple to the complex, Salesforce Flow can help you eliminate repetitive tasks such as updating a case to closed if there's no action after five days, or using guided, end-to-end workflow apps to revamp your manual processes. Streamlined experiences like replacing PDF forms with customer-facing online applications can unleash transformative customer and employee interactions. Flow helps teams focus on delivering value, improving productivity at work, and providing new customer experiences fast.

① Reimagine Processes with Salesforce Flow

Reimagine your processes so you can innovate fast.

Whether you need to automate simple repetitive tasks or invent new digital workflows, Salesforce Flow helps you reimagine your existing processes by making it easier and faster to increase productivity and create seamless customer interactions.

Design business processes with clicks.

Build enterprise-scale automation fast with visual elements and reusable building blocks.

Automate across connected systems.

Bring systems and data sources together in a seamless workflow.

Embed guided workflows everywhere.

Enhance user experience and business agility with guided interactions.

Empower everyone to automate, fast.

Automate across Customer 360 and Employee 360.

Sales	Service	Marketing	Commerce	IT	HR
Order Processing	Tier 1 Answer Resolution	Managing Email Lists	Update & Manage Orders	Incident Management	New Hire Approvals
Payment Collection	Case Routing & Pre-Processing	Email Journey Triggers	Order Scheduling & Pickups	Asset Management	Onboarding & Offboarding
Debt Collection	Service Fulfillment	Sales Rep Notification	Subscription Management	Purchase Order Tracking & Approvals	Leave Request Processing
Account Planning					Recruiting

Innovate fast with prebuilt solutions.

The beauty of Flow is that you can start quickly and leverage a wide array of prebuilt solutions and building blocks. Flow templates let you lean into industry best practices such as work order management and case creation. Using the available Work Order Utility Flow solution on AppExchange, you can quickly build experiences for your field technicians to update relevant line items in a work order. It provides an excellent base for further customization depending on your unique business needs, without starting from scratch.

There are three types of prebuilt solutions:

- Flow Templates are configurable end-to-end business processes that you can modify and customize to your business needs.

- Flow Actions are the standalone automation prepackaged functionalities that you can download from AppExchange to add to your automation.

- Automation Components are granular and reusable building blocks that expose additional functionalities, including actions and UI components.

> "With declarative automation tools, I can revamp business processes and deliver great business value to end users or customers at a quicker pace than custom code."
>
> **Jennifer Lee**
> Lead Solution Designer at John Hancock

Companies are transforming experiences with Flow.

In the following sections of this playbook, you'll read stories that showcase a range of automation. Starting with simple task automation, you can save time and effort by automating any predictable actions. On the other end of the spectrum, you can reimagine your entire workflow by integrating with other Einstein Automate products. Optimize business outcomes with decision-assist that can do things like providing the most appropriate discount offers to your customers at the most relevant time. Regardless of the use case, Flow can add value at every level with little to no code.

# 2 Say Goodbye to Repetitive Tasks with Simple Automated Actions

Improve productivity with one-step triggered flows and batch jobs.

What are some of the repetitive tasks you have on your team? Is it sending follow-up emails after an account is closed? Is it reconciling billing at the end of every month? What these have in common is that they have a predictable pattern or a simple business rule. Each task may take only a few minutes to do manually, but when it's something that must be done again and again, it adds up. Flow can help you reclaim tons of time for your company and remove the potential for error by automatically taking any follow-up actions for you. Triggered flows and batch jobs are simple to create and can serve as a good starting point on your automation journey for dealing with repetitive tasks that you want to get off your plate.

Add value with triggered actions.

Triggered actions are perfect for automating any follow-up tasks after the trigger event happens. They can help save time on repetitive tasks, or they can expedite needed efforts in a business process.

Here's a real-world example of how you can automate a critical business process: If a high-value opportunity is created or updated (the trigger), then a push notification is sent to the accounts team (the action). Then, an account manager can follow up with the prospect immediately.

Trigger(s)
(e.g., update record, new record)
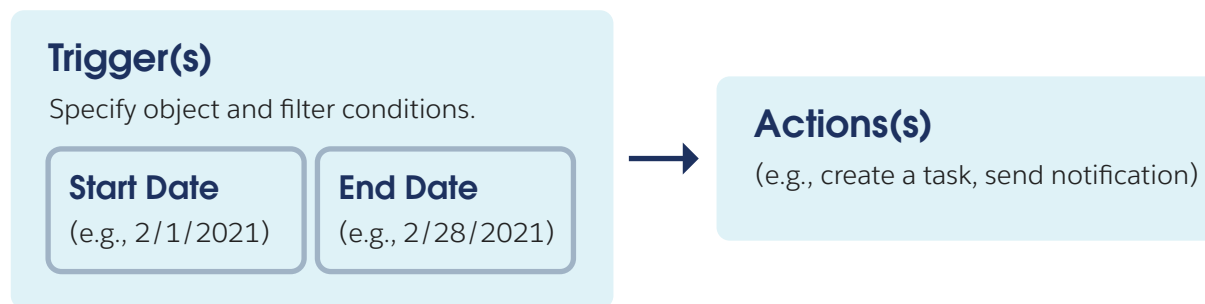
→

Action(s)
(e.g., send confirmation email)
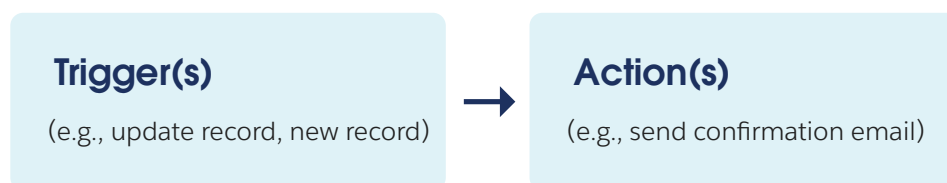
The value of triggered actions is that you don't have to work on mundane tasks manually. Automating something that's predictable based on a previous event saves you from sending that extra follow-up email, updating that record manually, or being delayed because the task got overlooked.

Cut through clutter with batch jobs.

Sometimes, the required actions may not be immediate, and this is where scheduled actions come in handy. With Salesforce Flow, you can set a trigger to run at a specific time and set it to run once, daily, or weekly. For example, if your lead source is the web, set up a scheduled action to remind reps to follow up after seven days.

With the ability to schedule actions, Flow allows you to create batch jobs that can automate actions at volume. Batch jobs are ideal for monthly billing reconciliations, renewal reminders, and any predictable processes that happen at regular intervals.

Flow works at scale by allowing you to run the same actions for a specified set of records in a batch. For example, if a renewal is due next month, create a task for the account manager to reach out to the customer. The renewal coming due is the condition, and all the accounts that fit this condition will be in the batch. The action is to set up a task for each of the accounts in that batch. If 30 accounts are up for renewal next month, then the job will run 30 times automatically.

Trigger(s)

Specify object and filter conditions.

Start Date
(e.g., 2/1/2021)

End Date
(e.g., 2/28/2021)

→

Actions(s)

(e.g., create a task, send notification)

Batch jobs bring value by taking actions on multiple records at once. In the example above, the time saving is twofold: finding the accounts that are up for renewal and saving the time it takes to assign the tasks. Batch jobs can automatically search for any accounts that are up for renewal and take action all at once. In this way, Flow not only saves time but also minimizes errors and delays, which can provide tremendous value, depending on how critical the process is to the business.

USE CASE SUCCESS   **Triggered Action**

Customer Service Status Updates

Adrienne Cutcliffe | Salesforce Consultant at SalesFix

Company Profile:

SalesFix is a Salesforce CRM implementation, integration, and services specialist based in Australia.

Use Case:

At SalesFix, a Salesforce consulting partner, customer support agents try to respond immediately to customer emails within a specified SLA. Traditionally, there may be delays in checking emails, and the case status is not always up to date.

Solution:

Adrienne Cutcliffe created a Flow that checks for new inbound email messages and updates case status accordingly when a new email is received. Flow can then flag the case owner or other users and resume any milestones that were on hold while the team was waiting on a response. This status update can be paired with an image-based formula field that displays an icon for inbound mail, making for a great visual experience.

Outcome:

This process helps accurately reflect response times for the SLAs and makes it obvious to a support agent when a case has received a response. It creates a more seamless experience for both customers and support agents.

> "Flow decreased the time between inbound email and response by 50%, with ~30% more accurate response times."
>
> **Adrienne Cutcliffe**

USE CASE SUCCESS   **Triggered Action**

Push Notifications for Support Tickets

Chris Halvachs | Salesforce Administrator at Dealer Inspire

Company Profile:

Dealer Inspire is the innovative disruptor building unprecedented technologies for dealerships to sell and service more cars.

Use Case:

When a partner dealership files a support ticket, performance managers at Dealer Inspire requested immediate awareness of the support cases so they could deliver the intended level of service.

Solution:

Chris Halvachs, Salesforce Administrator at Dealer Inspire, created a custom notification that gets triggered any time a new support case is created. Using a lookup field on the Account record, a mobile notification and an email alert are sent to the performance managers associated with the newly created case.

Outcome:

The case creation notifications instantly keep the performance manager in the loop and provide timely customer support whenever an issue comes up.

"This simple automation had a big impact on our teams, giving them essential visibility into their customers' support requests to ensure the best customer experience."

Chris Halvachs

USE CASE SUCCESS **Batch Job**

Batch Project Onboarding

Nadina Lisbon | System Capability and Salesforce Architect at Tradeshift

Use Case:

As part of Tradeshift's project onboarding process, onboarding managers need to be notified to audit the quality of the work done so far. An email is sent out to the manager if the manager field has been updated on a user record.

Solution:

Nadina created a batch job that fetches all records associated with the onboarding users. Her Flow queries the manager's email from the Salesforce User Object, compares how the emails are different, and updates the custom object email for the onboarding manager. The process also alerts the managers if they are required to take action on the record.

Outcome:

Today, jobs can be run ad hoc after any user manager updates, saving admins from loading the data every week.

"After creating this job my admins were able to save an average of three hours weekly."

Nadina Lisbon

3 Determine the Right Actions with Advanced Logic

Define the correct action for any given moment.

Flow can help you handle more complex business rules by modeling the logic behind different decisions and determining whether a particular action should be taken or not.

Automate complex logic.

Triggered actions are great, but not all business processes are that simple. When things are more involved, Flow really starts to deliver. You may have a process that involves more complicated logic, including different branching decisions and actions to be followed.

For example, a company can have different customer onboarding experiences for different types of customers. There may be various tasks and actions that are mapped to the customer as part of the onboarding process associated with each customer tier.

Gold Tier

Assign a dedicated account manager

Allot 72 hours of professional services

Update SLA to be 99.99% uptime

Schedule onboarding workshops

Silver Tier

Assign a dedicated account manager

Allot 24 hours of professional services

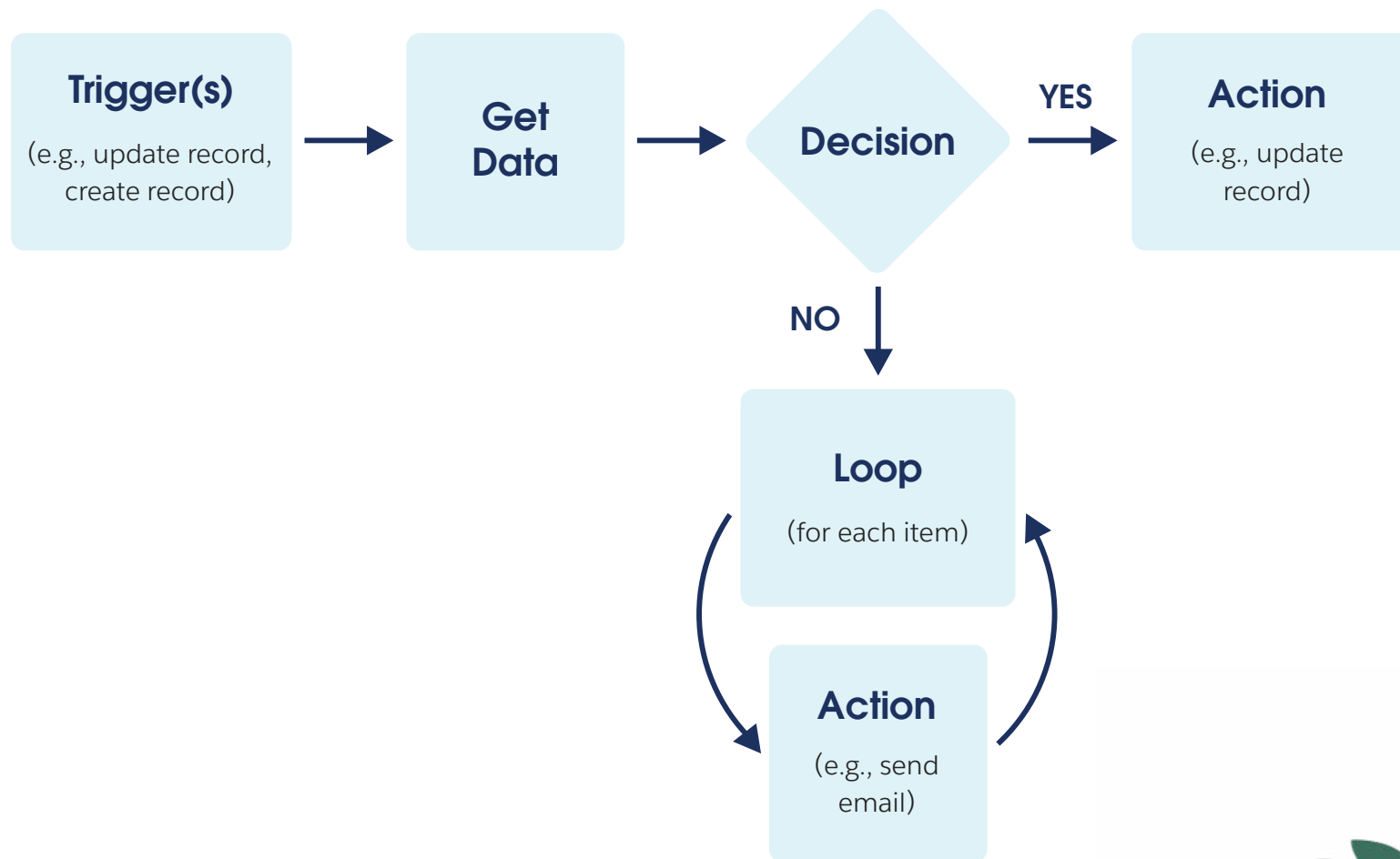Update SLA to be 99% uptime

Bronze Tier

Assign an account manager

Allot 5 hours of professional services

Update SLA to be 95% uptime

Flow makes it easy to define the right actions by modeling complex decision logic and looping through a number of records to take action, all without using code.

Trigger(s)

(e.g., update record, create record)

→

Get Data

→

Decision

YES →

Action

(e.g., update record)

NO ↓

Loop

(for each item)

Action

(e.g., send email)

Complex Logic Automation in Determining Refund Requests

When customers contact a company to request a refund, the decision to provide a refund can be complex and open to each representative's interpretation. Automation can smooth out this process, ensuring a resolution in less time and within the company's guidelines.

Flow allows companies to build a decision tree that considers a predetermined set of conditions – such as the return date, return reason, or whether the item is opened – as part of the determining factors. The logic is built in to help the agent make a standardized decision. Flow delivers an output that determines if the agent should issue a refund or not.

Now, agents can be confident that they aren't issuing unnecessary refunds and can focus on delivering a consistent customer service experience.
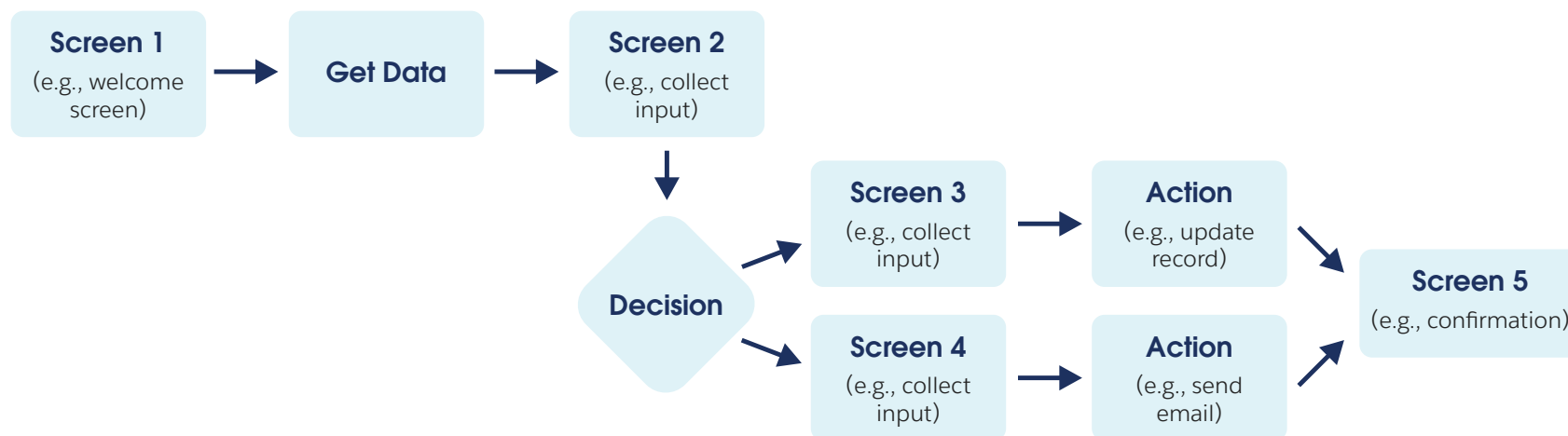
4 Standardize Processes and Minimize Error with Guided Workflows

Map out every step and guide users throughout the process.

Flow can go a step further and assist you in building guided experiences, so the entire process is managed seamlessly with nothing overlooked. You can leverage guided workflows to map out the whole interaction by displaying and collecting information that you need to complete the process.

### Provide forms or wizards to guide your users.

Earlier, we considered decision trees and automated actions to increase productivity. Whether it's an automated message or assigned task, the automation happens in the back end without human interaction until you see the output. However, some automation requires more interaction. For example, a customer service agent who helps a customer handle requests such as updating billing information or canceling an order would need input from the customer to verify their identity or provide an order ID. You can use a Screen Flow to guide the agent through screens that collect the necessary display information, create and update Salesforce records, and execute logic based on user

The value of guided workflows is that they reduce training costs and minimize mistakes for employees. They also create a standardized operational model to ensure consistent processing.

Embed processes in engaging digital experiences.

Flow's ability to enable employees is powerful, and it can be extended to your customers as well. You can create seamless customer service experiences by giving customers access to business processes in their self-service channels. Screen Flows can be embedded in external-facing customer portals. Instead of contacting a service agent to cancel an order, the same Screen Flow can be made available on your website so the customer can self-service 24/7. Making simple processes available externally frees up your valuable agent time to handle more complex, business-critical cases.
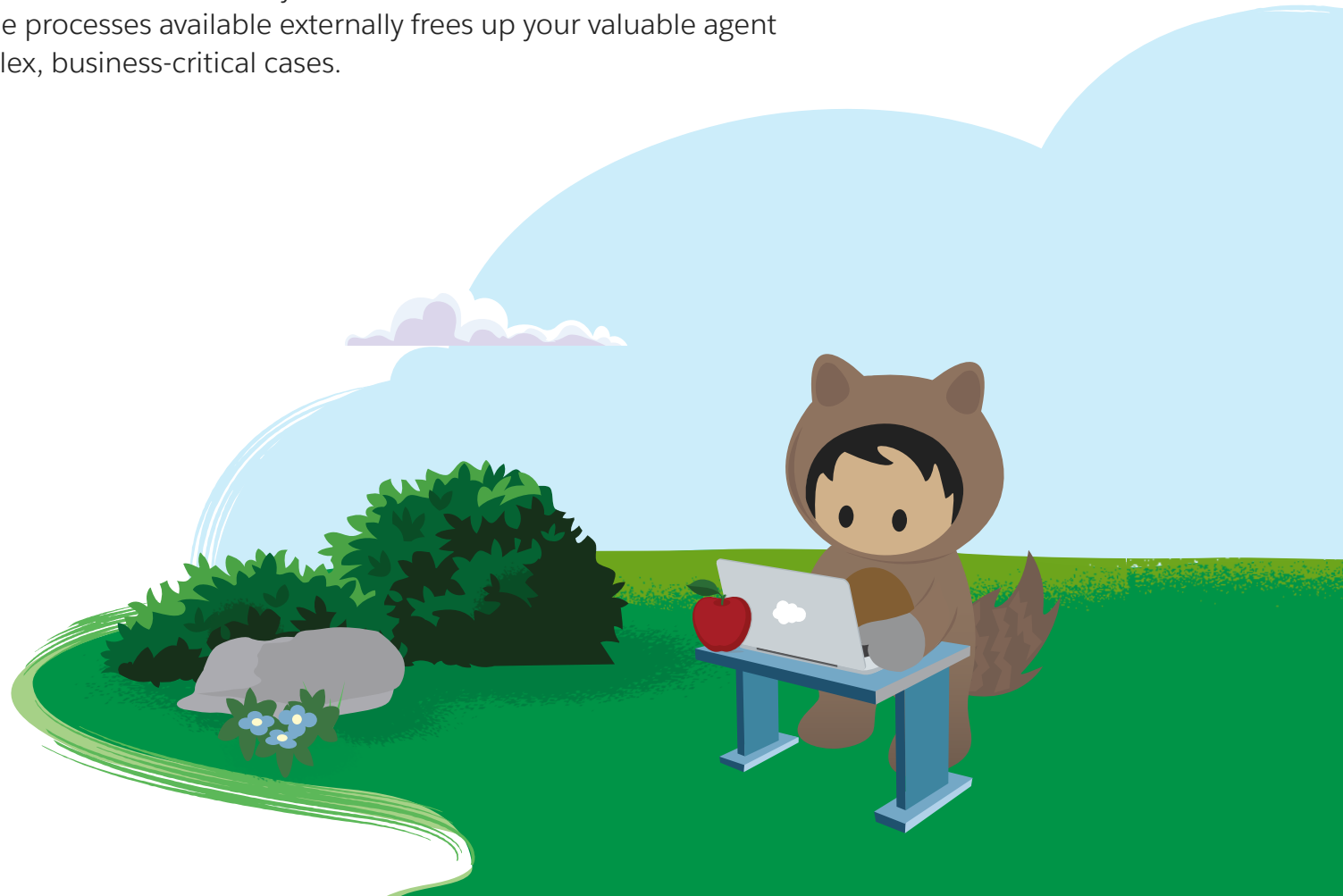
USE CASE SUCCESS   **Guided Workflow**

Guide Managers to Create Custom Notifications

Michelle Hansen | Senior Salesforce Administrator at NISC

Company Profile:

National Information Solutions Cooperative (NISC) is an information technology company that develops and supports software and hardware solutions for utility cooperatives and telecoms.

Use Case:

Sometimes, the company needs to send notification blasts out to users that do not relate to a specific record, but a mass email can easily be overlooked. The solution was to shift to using custom notifications in Salesforce to keep users abreast of the latest information.

Solution:

Authorized managers can launch a Screen Flow from the Utility bar, select the public groups or users who should be notified, type in the message details, and send the custom notification to everyone's desktop or mobile devices.

Outcome:

Emails get lost in the shuffle, but custom notifications always attract attention.

"Our company has put an emphasis on reducing email traffic and improving communication. Custom notifications in Salesforce give us the ability to get the message to our users where they spend most of their time."

Michelle Hansen

USE CASE SUCCESS   **Guided Workflow**

Provide Self-Service Online Loan Application

Stewart McNaught | Senior Salesforce Developer at Zions Bancorporation

Company Profile:

Zions Bancorporation is one of the nation's premier financial services companies, with total assets exceeding $70 billion. The company is a national leader in Small Business Administration lending and public finance advisory services.

Use Case:

Zions Bancorporation provides a wide range of traditional banking and innovative technology services to individuals and business clients. When the Small Business Administration's lending program was announced in response to the novel coronavirus, Zions Bancorporation realized it needed to scale and provide a quick solution that would replace its homegrown system and facilitate the application, approval, and lending process.

Solution:

Zions Bancorporation leverages a self-service portal using Salesforce Experience Cloud to facilitate conversations with customers and track loan application processes to provide client visibility. Stewart lead the development team who built a new PPP loan application process to digitally capture all required documents in one streamlined process using prebuilt Flow components from AppExchange. The automated process will route completed PPP loan applications to the appropriate banker to follow up and help customers get loans funded.

Outcome:

Zions Bancorporation was able to deliver the automated loan intake process in 6 days instead of months. At its peak, the company's central loan center processed approximately 140 times its standard daily volumes.

> **"Salesforce Flow provides our Salesforce team rapid development and value when it is needed."**
>
> **Stewart McNaught**

5 Create New Processes with End-to-End Workflow Apps

Imagine the experience your business needs and bring it to life.

So far, we've discussed how existing business processes can be automated to increase value. What if that current process is not the most optimized workflow or if the process is being completely disrupted? Whatever it is, Einstein Automate can help. By combining Salesforce Flow with AI, chatbot, or low-code integration tools, you can build end-to-end workflow apps that create new ways for your customers and employees to engage with you.

Here are a few examples of what you can do with end-to-end workflow apps powered by Einstein Automate.

Deliver AI-powered contextual recommendations.

Infuse your existing workflow with the power of AI. By leveraging predictive models, you can enhance your business workflow to take the most optimal action at the right time. For example, your sales teams can use Einstein Next Best Action to surface the best discount offer based on your customer data. Each offer is then linked to an automated action that is powered by Flow.

Automate chatbot actions.

Create a chatbot using Einstein Bots to provide immediate, 24/7 assistance to your customers. Enable your customers to self-serve everyday tasks such as updating billing addresses or making changes to an order by connecting bot conversations to automated actions based on customer input.

Take actions across integrated systems.

Take your automation to the next level by handling transactions beyond Salesforce data. Whether it's connecting to your legacy ERP system or other web applications, Salesforce Flow can help you automate actions across systems by using Open API standards through External Services or creating custom MuleSoft connections.

USE CASE SUCCESS   Bots

Keep Essential Meals Coming

Samantha Philip | Developer, CS Systems at Sun Basket

Company Profile:

Sun Basket is a subscription-based meal delivery service that ships members fresh organic and sustainable ingredients and recipes every month.

Use Case:

In the first few weeks of the shelter-in-place order, meal delivery service Sun Basket faced a sudden surge in case volume and needed to adapt its customer service quickly. With people staying home and avoiding grocery stores, Sun Basket was experiencing high demand for food delivery kits. Sun Basket needed a solution that would help it quickly scale to support its customers.

Solution:

Sun Basket turned to a chatbot to reduce the volume agents receive. The bot handles transactional requests, like tracking customer orders or packages, reporting any issues with delays or damage, and processing a credit or refund.

The chatbot also helps to handle cases outside of business hours and can create a case for customers preferring to have agents follow up later via SMS or email.

Outcome:

During this period, customers rated automation-resolved cases at the same level as agent-resolved cases: in the low 90% range. Customers called the warehouse staff who prepare Sun Baskets every week "heroes" because they are "helping them stay safe inside" and serving front-line workers.

6 Increase the Speed of Work

End-to-end workflow for every industry.

Building rich, dynamic process automation saves time, reduces errors, and frees people to do meaningful work. With Einstein Automate, everyone can be more productive by building intelligent workflows that span every business function and industry.

Reimagine your process, fast.

Salesforce Flow powers the business process automation capabilities at the core of Einstein Automate by allowing companies to build enterprise-scale automation with clicks, not code. It's easy to get started reimagining your business processes with prebuilt solutions. Start your transformation by empowering everyone to:

- **Save time with easy and predictable trigger and actions**
- **Minimize errors with guided engagement**
- **Streamline complex processes with end-to-end workflow apps**

Getting started with automation has never been easier.

Start transforming your business process today by learning how to build your first automation on Trailhead.

TAKE THE TRAIL

sforce.co/flow-trail