

January 2025 Edition

Salesforce Agentforce:

A Guide to Transformative
AI-Driven Customer Support

Now Including

Agentforce 2.0

Appendix



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Thank you & congratulations on embracing AI-powered Customer Service



Customer service is evolving, and Salesforce Agentforce puts the tools in your hands to meet those changes head-on. It's a platform designed to help you deliver faster, smarter, and more personalised experiences at every touchpoint. By combining advanced AI with seamless integration into your existing systems, Agentforce empowers your team to work efficiently and with greater impact.

Integrating Agentforce into your organisation is an opportunity to rethink how you approach customer interactions. It helps automate repetitive tasks, giving your team the time and focus to handle complex challenges and build stronger relationships. At its core, this is about delivering a level of service that not only meets but exceeds your customers' expectations.

Executive Summary

Salesforce Agentforce is transforming how organisations deliver customer support and beyond, leveraging the power of generative AI and autonomous agents to create a dynamic, scalable, and highly personalised service experience.

Introduced at Dreamforce, Agentforce marks a paradigm shift in automation and engagement, enabling businesses to redefine their operations while maintaining trust through the industry-leading security and compliance measures of the Einstein Trust Layer. By automating routine interactions, offering predictive insights, and enabling proactive engagement, Agentforce empowers teams to enhance productivity and deliver exceptional customer experiences.

This white paper aims to provide a comprehensive exploration of Agentforce's architecture, capabilities, and strategic value. From its integration with Salesforce tools like Flows, Prompt Builder, and the Atlas Reasoning Engine to detailed use cases across industries, the paper examines how Agentforce can optimise customer support and streamline operational workflows. It also addresses the technical, organisational, and licensing requirements for a successful deployment, guiding businesses on how to plan and scale Agentforce effectively. With Sirocco's expert guidance as a Salesforce

partner, organisations can maximise Agentforce's potential, unlocking a future-ready support model tailored to evolving customer expectations.

Agentforce is more than a tool; it's a strategy for modernising and future-proofing customer service and operational efficiency. By striking the perfect balance between automation and human expertise, it enables organisations to reduce costs, enhance scalability, and improve customer satisfaction in an increasingly competitive and fast-changing environment.

While every effort has been made to ensure the accuracy and relevance of the information in this white paper, the field of AI-driven customer service is dynamic and continuously evolving. The content reflects the knowledge and understanding available at the time of publication. We encourage our readers to consult their Salesforce AEs or reach out to us for the most up-to-date insights and guidance as they explore and implement Salesforce Agentforce. Thank you and enjoy reading!

Introduction

Customer expectations are higher than ever, with demands for faster response times, deeper personalisation, and 24/7 availability across multiple channels. Traditional customer service models often struggle to keep pace, leading to inefficiencies, rising operational costs, and frustrated customers.

Salesforce Agentforce offers a revolutionary solution - an AI-powered platform designed to automate routine inquiries, deliver predictive support, and enable proactive customer engagement, all while maintaining the highest standards of trust and security through the Einstein Trust Layer.

Agentforce is not just another customer service tool. It is a comprehensive, AI-driven platform that integrates seamlessly with Salesforce's ecosystem, including tools like Service Cloud, Customer 360, and Data Cloud. By leveraging advanced generative AI, autonomous agents, and intelligent data handling, Agentforce transforms how organisations manage their operations. It delivers real-time insights, facilitates human-like interactions, and optimises workflows with components like Salesforce Flows and the Atlas Reasoning Engine.

This transformation, however, requires more than technology—it demands careful planning, aligned teams, and robust

workflows to unlock Agentforce's full potential. Throughout this white paper, you'll discover actionable insights tailored to your needs, best practices for deploying and optimising Agentforce, and real-world examples showcasing its transformative capabilities across industries. Whether your goal is to reduce customer service costs, improve first-contact resolution rates, or scale support operations to meet growing demand, Agentforce provides the intelligence and tools to help you succeed.

At every step of this journey, Sirocco is here as your trusted advisor. With expertise in scaled agile frameworks, data integration, and AI-powered customer support, we guide organisations in adopting and optimising Agentforce to achieve meaningful, measurable outcomes. Together, we can align Agentforce with your organisational strategy, ensuring a seamless implementation that drives operational excellence and enhances customer satisfaction.

What is Salesforce Agentforce?

Salesforce Agentforce is a cutting-edge platform that combines generative AI and advanced automation to redefine customer support and drive operational excellence across industries.



Designed to address the challenges of managing high volumes of interactions, Agentforce enables organisations to streamline workflows, boost team productivity, and deliver highly personalised, context-aware experiences at scale. Whether you aim to optimise customer service operations, empower your sales team, or transform marketing engagement, Agentforce provides the flexibility and intelligence to meet your organisation's goals.

Operating seamlessly within the Salesforce ecosystem, Agentforce integrates with tools such as Service Cloud, Customer 360, and Data Cloud. This interoperability ensures

that AI agents can access and utilise real-time data from every touchpoint—digital, in-person, or across communication channels—creating a unified customer experience. For instance, an Agentforce agent assisting with troubleshooting can instantly retrieve a customer's history, analyse previous resolutions, and recommend tailored next steps, all within seconds. This real-time capability empowers teams to deliver responses that feel both relevant and informed.

What truly sets Agentforce apart is its adaptability. Powered by the Atlas Reasoning Engine, Agentforce agents don't simply follow

static workflows—they dynamically adjust based on customer inputs and contextual data, enabling them to handle everything from routine inquiries to complex decision-making processes. This dynamic approach is bolstered by the Einstein Trust Layer, which ensures that all interactions meet stringent security and compliance standards, protecting both your organisation and its customers.

Agentforce also represents the latest evolution in Salesforce's AI strategy, building on innovations like Einstein Copilot. While Einstein Copilot pioneered generative AI in CRM, Agentforce goes further by addressing key limitations. For example, Copilot's reliance on Chain-of-Thought (CoT) reasoning provided a step-by-step approach to tasks but lacked the adaptability required for ongoing, dynamic interactions. Agentforce overcomes these challenges with advanced contextual reasoning, allowing AI agents to handle follow-up inquiries, adjust plans in real-time,

and scale seamlessly across thousands of use cases.

Scalability is another hallmark of Agentforce. Its modular architecture allows organisations to start small—using pre-configured agents for standard tasks like FAQs—and expand functionality as needs evolve. From automating responses to integrating predictive analytics for customer engagement, Agentforce grows alongside your business, ensuring it remains a valuable asset in a rapidly changing marketplace.

This section sets the stage for exploring how Agentforce's core components—like Salesforce Flows, Prompt Builder, and the Atlas Reasoning Engine—work together to drive automation, personalisation, and efficiency. As you delve deeper, you'll see how this platform transforms customer service and positions your organisation for long-term success.



Key Components of Salesforce Agentforce

Salesforce Agentforce is powered by a suite of advanced components, all working together to help you deliver intelligent, secure, and highly adaptable customer interactions. By understanding how each element contributes to the platform's functionality, you can optimise its use to meet your organisation's unique needs and challenges.

Atlas Reasoning Engine

At the core of Agentforce is the Atlas Reasoning Engine, designed to interpret your data and make decisions dynamically. This advanced AI model uses historical interactions, real-time inputs, and predictive analytics to provide responses that are not only accurate but also contextually relevant. Whether you're handling multi-step customer inquiries or automating complex workflows, the Atlas Reasoning Engine adapts in real time, ensuring each interaction feels tailored and efficient.

Salesforce Flows

Salesforce Flows are the operational backbone of Agentforce, enabling you to create workflows that automate routine tasks and manage intricate processes with ease. These low-code tools allow you to design, implement, and adjust workflows as your needs evolve, ensuring seamless integration with your existing systems. Whether it's

automating data retrieval or orchestrating conditional tasks, Salesforce Flows help you streamline operations while maintaining the flexibility to adapt to changes in your business environment.

Prompt Builder

Prompt Builder is your tool for managing AI prompts with simplicity and precision. It lets you create, test, and refine the interactions your AI agents will have with customers. By dynamically pulling data from your CRM, Data Cloud, Flows, and more, Prompt Builder ensures that AI agents always respond with accuracy and relevance. Operating within the Einstein Trust Layer, it guarantees the security and ethical grounding of AI outputs by masking sensitive information and reducing bias. With its integrated Playground for prompt testing, you can confidently deploy prompts that align with your organisational goals and provide meaningful customer experiences.

Model Builder

Model Builder gives you the power to create and customise AI models tailored to your business. By integrating with external platforms like Google Cloud Vertex AI, you can build models that are optimised for specific needs, such as customer segmentation or lead prioritisation. Model Builder allows you to incorporate proprietary datasets into your workflows without duplicating data, ensuring precision and efficiency. As your organisation evolves, you can refine and expand your models, keeping your AI capabilities aligned with your goals.

Einstein Trust Layer

The Einstein Trust Layer is designed to protect your data and ensure that AI interactions meet the highest standards of security and compliance. It grounds AI outputs in CRM data to ensure accuracy, masks sensitive information to safeguard privacy, and includes mechanisms to detect and mitigate bias and toxicity. With audit trails and feedback loops, the Trust Layer allows you to maintain full transparency and control over AI-driven processes. Its alignment with regulations like GDPR and CCPA provides peace of mind as you scale your AI initiatives.

Agent Builder

Agent Builder is where you customise AI agents to fit your business's unique requirements. With its intuitive interface, you can configure agents to handle specific topics, such as "Order Management," and assign actions like "Generate Return Email." By extending Agentforce's capabilities with Salesforce Flows, Apex code, prompt

templates, and MuleSoft APIs, Agent Builder helps you create intelligent agents that seamlessly fit into your workflows. This flexibility allows you to deploy agents for a variety of use cases, from customer support to sales enablement, helping your teams work smarter and faster.



These components work together to form a cohesive system that adapts to your organisation's needs. By leveraging each element effectively, you can create workflows that drive efficiency, enhance customer experiences, and maintain the highest standards of security. Understanding these tools is the first step in unlocking the full potential of Salesforce Agentforce for your business.

Implementation Strategies for Salesforce Agentforce

Deploying Salesforce Agentforce successfully requires a clear strategy tailored to your organisation's unique needs. By following a structured approach, you can ensure seamless integration into your existing workflows, align the platform with your objectives, and create scalable outcomes. This section outlines the key steps for a smooth and impactful implementation.

Step 1: Initial Assessment and Goal Setting

Before diving into implementation, it's important to evaluate your organisation's current workflows and customer engagement challenges. Take the time to identify operational pain points and define measurable objectives that align with your business goals. This might include improving response times, increasing first-contact resolution rates, or enhancing customer satisfaction. Collaborating with stakeholders across customer service, IT, and leadership teams ensures that everyone is aligned and invested in the platform's success.

Step 2: Technical Setup and Data Preparation

The technical foundation of your Agentforce deployment is critical. Begin by ensuring that your CRM data is well-structured, up-to-date, and accessible. This is essential for grounding AI agents in accurate and relevant information. Configure Salesforce Flows to support automated workflows and ensure seamless data integration. Tools like MuleSoft can help connect Agentforce to other systems, such as inventory or billing platforms, enabling real-time data synchronisation.

As you prepare your data infrastructure, pay close attention to security and compliance requirements. Leverage the Einstein Trust Layer to safeguard sensitive information, meet regulatory standards like GDPR, and maintain customer trust throughout the process.

Step 3: Pilot Deployment and Testing

Start with a focused pilot to validate Agentforce's capabilities and gather feedback. Select a specific use case or department where the platform's impact can be easily measured. During this phase, monitor key performance indicators (KPIs) such as accuracy, efficiency, and customer sentiment. This will help you identify areas for improvement before scaling the deployment.

Equally important is training your teams to work effectively alongside AI agents. Provide hands-on guidance on how to interpret AI recommendations, manage escalations, and refine workflows based on real-world feedback. Salesforce Trailhead offers valuable training resources that can support your team's learning process.

Step 4: Full Deployment and Scaling

With insights from the pilot phase, you can confidently scale Agentforce across your organisation. Roll out the platform incrementally, expanding its use case coverage while continuously monitoring performance. Use Salesforce analytics tools to track KPIs such as resolution rates, cost-per-conversation, and customer satisfaction scores. This data will inform ongoing workflow refinements and help you maintain alignment with your service goals.

Step 5: Continuous Optimisation and Innovation

Agentforce is a dynamic platform that evolves with advancements in AI and shifting customer expectations. To keep pace, make ongoing optimisation a priority. Regularly evaluate your workflows, data models, and team performance to identify opportunities for improvement. Explore new use cases and stay informed about Salesforce's roadmap to adopt emerging features and capabilities proactively.

Sirocco's Role in Agentforce Deployment

Navigating an Agentforce implementation can be complex, but with the right partner, the process becomes much simpler. As a trusted Salesforce partner, Sirocco offers expertise in every stage of deployment, from strategy and technical setup to training and optimisation. Our team works closely with you to ensure that Agentforce aligns seamlessly with your business objectives and delivers measurable results. Let's build some Agents together!



Key Capabilities and Use Cases of Agentforce

Salesforce Agentforce is a robust platform designed to deliver exceptional customer service and operational efficiency by blending advanced AI-driven automation with real-time data handling. Its capabilities span a variety of business functions, enabling organisations to streamline workflows, personalise interactions, and scale their operations seamlessly. By combining intelligent automation with the Salesforce ecosystem,

Agentforce empowers teams across service, sales, and marketing to focus on what matters most: delivering impactful customer experiences. Agentforce stands out for its ability to handle complex and varied tasks across departments. Whether you're looking to optimise service responses, drive sales efficiency, or enhance marketing outreach, Agentforce agents can be configured to meet your organisation's specific requirements.



Sample Actions of Agentforce Agents

Your Agentforce agents will be able to perform a wide range of actions tailored to service, sales, marketing, and general CRM tasks. These examples illustrate the flexibility and power of Agentforce, helping you envision its application in your business.

Service Agents

- **Answer Questions with Knowledge:**

Provide precise answers based on relevant knowledge articles, ensuring quick problem resolution.

- **Summarise Scheduling Issues for Field Service:**

Highlight service appointments requiring urgent attention, enabling better prioritisation.

- **Refine Post-Work Summaries:**

Enhance clarity and detail in work order summaries, improving record-keeping and follow-ups.

- **Create Appointment List Filters:**

Simplify task management by filtering appointments based on specific criteria.

Sales Agents

- **Prioritise Opportunities:**

Identify and rank top sales opportunities with clear explanations of ranking logic.

- **Draft or Revise Emails:**

Generate tailored, impactful email drafts optimised for engagement.

- **Get Forecast Guidance:**

Track progress towards sales quotas, identifying at-risk deals and offering recommendations to close gaps.

- **Create Close Plans:**

Help sales reps organise their steps to close opportunities by the target date.

Marketing Agents

- **Create Campaigns:**

Design marketing campaigns with customised targeting and messaging for specific goals.

- **Draft Content:**

Generate marketing copy for emails, social media, or landing pages tailored for maximum impact.

- **Generate Insights:**

Provide performance analytics to refine and optimise marketing strategies.

General CRM Agents

- **Get Activities Timeline:**

Present a comprehensive history of past and upcoming CRM activities.

- **Find Contact Interactions:**

Identify accounts or opportunities influenced by a contact to support strategic engagement.

- **Create a To-Do:**

Generate tasks to manage follow-ups and maintain team organisation.

- **Retrieve Product Pricing:**

Access detailed pricing information, including historical trends, to support data-driven discussions.



Best Practices for Agent Topics

Agent topics are the fundamental units that define the capabilities and behavior of your AI agents. They categorise actions and instructions into coherent groups, enabling your agents to handle a wide range of tasks and respond to diverse user requests. By establishing clear boundaries, setting appropriate context, and defining specific behaviors, topics ensure that your agents deliver accurate, consistent, and contextually relevant interactions. Salesforce provides a library of standard topics for common business use cases, or you can create custom topics to tailor your agents to your unique business needs.

When designing topics:

- **Embed Business Rules:**

Build deterministic business logic directly into actions to ensure consistency and avoid ambiguities.

- **Start Simple, Refine Over Time:**

Introduce minimal instructions initially and iteratively add complexity as workflows evolve.

- **Define Industry-Specific Terms:**

Clarify unique terms or abbreviations in plain language to improve agent comprehension.

- **Maintain Consistency:**

Use clear, precise language for actions and processes to minimise errors and ensure predictable behaviour.

For instance, instead of instructing an agent with “Don’t refund an order unless it was within 30 days,” embed this rule directly into a flow-based action. This approach eliminates variability in interpretation, ensuring consistent and reliable results.

Expanding the Possibilities

Agentforce is built to scale with your organisation’s needs. Whether automating FAQs, enhancing customer engagement, or streamlining workflows across departments, its modular design allows you to start small and expand over time. By incorporating these sample actions and best practices into your implementation strategy, you can fully leverage Agentforce’s capabilities to drive operational efficiency and deliver outstanding customer experiences.

Best Use Cases for Salesforce Agentforce

When implementing Salesforce Agentforce, knowing where and how to deploy the platform is crucial to maximise its effectiveness. Not all scenarios are equally suited to automation, and striking the right balance between AI-driven processes and human intervention can transform customer experiences and operational efficiency. Let's explore where Agentforce delivers the most value and where a more nuanced approach might be required. You want to start somewhere – this might be it.



Effective Use Cases for Automation

Agentforce thrives in scenarios that are high in volume but somewhat low in complexity, where predefined workflows and structured data can deliver quick and consistent results. By automating these interactions, you can significantly reduce costs, improve response times, and free up human agents to focus on more nuanced tasks.

Handling Routine Inquiries

Tasks such as providing order updates, account balances, or shipment tracking are ideal for automation. These interactions are repetitive and rules-based, allowing Agentforce agents to deliver accurate responses in real-time without requiring human intervention.

Managing FAQs and Knowledge Requests

Agentforce can streamline responses to frequently asked questions, such as product details, policy clarifications, or troubleshooting guides. By integrating with your organisation's knowledge base, AI agents can provide instant answers, reducing customer wait times and ensuring consistency in communication.

Processing Low-Value Transactions

Tasks like simple refunds, order cancellations, or loyalty point redemptions are perfect for Agentforce's automation capabilities. With clear thresholds and criteria in place, these workflows can operate autonomously while flagging exceptions for human review.

Supporting Loyalty Programmes

Agentforce can manage loyalty programme inquiries, such as points balances and redemptions, by integrating with your CRM and relevant data sources. This enhances the customer experience by providing seamless, real-time updates.

When Human Agents Are Essential

While Agentforce excels in automating standardised processes, there are scenarios where human judgement, empathy, and contextual understanding are irreplaceable. These often involve high-value, emotionally sensitive, or highly complex cases.

High-Stakes Transactions

Interactions involving VIP customers, large financial transactions, or regulatory compliance often require the flexibility and discretion of human agents. AI can support these processes by providing background data and initial insights, but final decision-making should remain with skilled personnel.

Emotionally Charged Situations

Cases involving distress, such as bereavement claims or crisis management, benefit from the empathy and active listening skills of human agents. AI agents can handle initial data gathering but should seamlessly transfer to human support when personal sensitivity is required.

Complex Technical Support

Troubleshooting intricate systems or devices often involves creative problem-solving and adaptability, areas where human expertise

remains superior. AI can provide diagnostic support but lacks the nuanced understanding needed for unpredictable challenges.

Customised Solutions

Customers seeking bespoke solutions, such as tailored financial advice or custom product configurations, require the flexibility of human agents. AI can facilitate these interactions by providing detailed context and suggestions, but final recommendations should come from a human expert.

By understanding these scenarios, you can strategically deploy Agentforce to maximise its impact. Automation can handle routine tasks efficiently, while human agents focus on interactions that require a personal touch, creativity, or high-level judgement. This balanced approach ensures that resources are allocated effectively, improving both operational efficiency and customer satisfaction.

Challenges and Considerations: Preparing for Salesforce Agentforce

Salesforce Agentforce is a game-changing platform that merges generative AI, automation, and real-time analytics to revolutionise customer engagement. Yet, implementing such a transformative technology comes with its own challenges. By addressing these considerations head-on, you can ensure a smooth deployment while maximising the platform's potential.

Language and Market Adaptability

Agentforce (at the time of us publishing this) supports a select range of languages, including English, French, German, Italian, Spanish, and Japanese. If your organisation operates in regions where these languages aren't predominant, you may face limitations in fully deploying the platform. Salesforce, however, is expanding language support, which will make Agentforce accessible to a broader global audience. In the meantime, you can focus on use cases and workflows that align with supported languages, ensuring a targeted and impactful implementation. To prepare for broader linguistic capabilities, monitor Salesforce's updates and prioritise regions or processes where current language support offers the greatest value.

Balancing Automation with Human Expertise

Finding the right balance between automated processes and human intervention is crucial. Agentforce excels at handling routine tasks like FAQs, order tracking, or simple claims processing. However, human agents remain indispensable for emotionally sensitive, high-stakes, or highly nuanced cases. Define workflows with clear escalation points, ensuring that AI and human teams collaborate seamlessly to deliver efficiency and empathy. You might start by automating repetitive inquiries to free your team for higher-value tasks. As you refine workflows, continuously review performance metrics to maintain the balance between automation and personalisation.

Integration and Technical Readiness

Agentforce delivers its full potential when seamlessly integrated with your existing systems, such as CRM, billing platforms, and inventory management tools. If your organisation relies on siloed systems or legacy infrastructure, integration may require additional planning. Using Salesforce tools like MuleSoft and APIs can streamline these processes, enabling real-time data synchronisation across your operations. Before implementation, evaluate your system compatibility and map out how Agentforce will connect with critical platforms. Establishing a roadmap for integration ensures smooth workflows and prepares your organisation for scalable growth.

Data Quality and Governance

Agentforce relies on high-quality, structured data to deliver personalised, context-aware interactions. Inaccurate or fragmented datasets can hinder its ability to perform effectively. By prioritising data governance, you can maintain a reliable foundation for AI-driven workflows. Conduct regular audits and validation processes to ensure accuracy, and centralise your customer data for easy access across systems. Efficient use of Data Cloud credits is another key consideration. Monitoring consumption and optimising workflows can prevent unnecessary costs, particularly during periods of high demand.

Preparing Your Team for Agentforce

Adopting Agentforce requires more than technical readiness; your team must be equipped to embrace new workflows and collaborate effectively with AI agents. Training programs that focus on technical skills and change management are essential to ensure success. Transparency is equally important. When your team understands the benefits Agentforce brings, you're more likely to foster enthusiasm and adoption. Invest in hands-on training to help your team interpret AI insights, manage escalations, and refine workflows. By engaging your employees early and addressing their concerns, you'll create a culture ready to thrive alongside this innovative technology.

Security, Compliance, and Ethical Considerations

Agentforce operates within the Einstein Trust Layer, which provides a strong foundation for data security and compliance with regulations like GDPR and CCPA. However, your organisation should go further by implementing additional safeguards tailored to your industry or business needs. Regular security audits, robust encryption protocols, and strict access controls are essential for protecting sensitive data. Ethical considerations should also be a priority. As AI becomes a central part of your operations, you need to reduce bias, ensure transparency, and maintain accountability in AI decision-making. These steps will build trust with your customers and align your AI strategies with your organisational values.

Scaling and Future-Proofing

Agentforce's evolving capabilities mean that your organisation must be ready to adapt and scale its operations as new features are introduced. Expanded language support, advanced topic classification, and predictive analytics are just a few of the innovations on Salesforce's roadmap. By staying informed and maintaining flexibility, you can position your organisation to take advantage of these advancements. Regularly review your workflows and explore new use cases as Agentforce grows. Expanding into other areas, such as marketing and commerce, allows you to extract even more value from the platform.

Positioning for Success

Implementing Agentforce is not without its challenges, but addressing these proactively ensures that your organisation is ready to leverage the platform's transformative capabilities. From aligning automation with human expertise to securing data and scaling effectively, thoughtful preparation is key to achieving long-term success. Sirocco is here to help you navigate these complexities. With expertise in data integration, technical readiness, and team training, we ensure that your Agentforce deployment is both seamless and impactful. Together, we can build a foundation that transforms customer engagement and drives sustained growth in an AI-driven future.



Agentforce in Action: Use Cases Across Industries

Salesforce Agentforce is a versatile platform that adapts to the needs of diverse industries. Its ability to combine intelligent automation with contextual decision-making enables organisations to improve efficiency, enhance customer experiences, and scale operations effectively. Below, we explore how Agentforce delivers value across key sectors, showcasing the capabilities of the platform when its components work together cohesively. Those are just examples of course. But in our Agentforce exploration workshop, we can discuss your specific ambitions and challenges.

Manufacturing: Proactive Maintenance and Downtime Reduction

For manufacturing organisations, equipment downtime can lead to significant financial losses and production delays. Agentforce can be configured to monitor IoT-connected machinery, integrating data from sensors and predictive analytics models. By identifying patterns that indicate potential failures—such as unusual vibrations or temperature fluctuations—Agentforce agents can proactively generate maintenance requests and provide actionable insights to repair teams. This proactive approach reduces unplanned downtime, enhances operational efficiency, and strengthens customer relationships by demonstrating reliability and foresight in addressing potential issues.

Retail: Personalised Customer Engagement and Scalability

Retailers often face surges in customer inquiries during peak seasons, such as holidays or sales events. Agentforce enables retailers to scale operations seamlessly by automating responses to high-volume queries, including order tracking, return policies, and product availability. Through integration with CRM and inventory systems, Agentforce provides real-time updates, personalised recommendations, and streamlined processes for routine tasks. This frees up human agents to focus on complex or high-value customer interactions, improving overall satisfaction while managing seasonal demand spikes effectively.

Telecommunications: Improving First-Contact Resolution Rates

Telecommunications providers frequently manage complex customer inquiries, ranging from troubleshooting connectivity issues to adjusting account details. By leveraging Agentforce's Atlas Reasoning Engine and Salesforce Flows, providers can offer dynamic support that resolves issues efficiently on the first contact. For example, Agentforce agents can analyse historical interaction data, device configurations, and network diagnostics to recommend tailored solutions. This reduces escalation rates, enhances first-contact resolution metrics, and improves customer retention by providing a seamless support experience.

Financial Services: Supporting Compliance and Customer Trust

In highly regulated industries like financial services, maintaining compliance while delivering exceptional customer experiences is paramount. Agentforce integrates with compliance frameworks to automate routine tasks, such as processing claims or verifying account details, ensuring adherence to industry regulations. Through the Einstein Trust Layer, Agentforce provides secure and auditable interactions, enabling financial institutions to address sensitive issues confidently. By automating low-risk tasks and reserving human agents for high-value consultations, organisations can balance efficiency with personalised service.

Healthcare: Enhancing Patient Support and Operational Efficiency

Healthcare providers often deal with high volumes of inquiries, ranging from appointment scheduling to insurance verifications. Agentforce agents can automate these routine tasks, ensuring faster response times and reducing administrative workloads. By integrating with patient management systems, Agentforce also facilitates secure access to medical histories and real-time updates, enabling personalised interactions. The platform's compliance with regulations such as HIPAA ensures that sensitive patient data remains protected while delivering value-driven support.

Agentforce's flexibility and adaptability make it an asset across industries, empowering organisations to tackle their unique challenges with tailored AI solutions. As we continue, we'll explore the technical infrastructure and organisational strategies necessary for deploying Agentforce effectively in these varied contexts.

Technical Infrastructure for Agentforce Deployment

A robust technical infrastructure is the foundation for a successful Salesforce Agentforce implementation. The platform's advanced AI capabilities require seamless integration with your organisation's existing systems, scalable processing power, and a strong security framework. Preparing your infrastructure not only ensures operational efficiency but also unlocks the full potential of Agentforce to deliver personalised, context-aware interactions at scale. Whether addressing data readiness, system compatibility, or compliance standards, a strategic approach to your technical environment is essential.

Data Integration and Accessibility

Agentforce thrives on accurate, accessible, and centralised data. It relies on integrations with systems such as CRMs, billing platforms, and inventory management tools to fuel AI-driven workflows and personalised interactions. Tools like Salesforce MuleSoft are instrumental in connecting these disparate systems, enabling real-time data flow that ensures AI agents are equipped to make dynamic, informed decisions.

To prepare for deployment, your organisation should conduct a comprehensive **data readiness assessment**. This process includes validating the accuracy and consistency of customer records across all systems,

identifying gaps in data coverage, and ensuring that critical information is accessible in real time. Establishing robust **data governance policies**—such as routine audits, maintenance schedules, and data cleansing protocols—further ensures that your datasets remain reliable over time.

Centralised data integration not only enhances Agentforce's effectiveness but also simplifies workflows, allowing teams to focus on delivering value rather than resolving discrepancies in fragmented systems. By prioritising accessibility and quality, you can optimise AI performance and enhance customer interactions across touchpoints.

Scalability and Processing Power

Agentforce's reliance on large-scale AI models and real-time analytics necessitates infrastructure capable of handling high data volumes and interaction intensity without latency. Leveraging Salesforce's cloud-native environment provides the flexibility to scale dynamically, ensuring your organisation can respond effectively to both routine operations and periods of heightened demand.

If your organisation anticipates significant data processing needs, planning for sufficient **Data Cloud credit allocation** is critical. Monitoring consumption patterns and refining workflows to optimise credit usage can prevent unexpected overages, ensuring consistent service delivery during peak demand periods. For businesses managing extensive datasets, additional credits or capacity planning may be required to maintain uninterrupted operations.

A scalable computational foundation is not just about handling current workloads—it's about future-proofing your infrastructure to support evolving business needs. Ensuring your systems can adapt as your AI-driven operations grow will enable long-term success with Agentforce.

Security and Compliance Framework

Agentforce is built on Salesforce's **Einstein Trust Layer**, which provides a secure foundation for ensuring compliance with global data protection regulations like GDPR and CCPA. However, implementing additional security measures tailored to your organisation's specific requirements is essential for safeguarding sensitive information and maintaining customer trust.

Key considerations for a comprehensive security framework include:

- **Access Controls and Authentication:**

Use role-based access, multi-factor authentication, and encryption protocols to restrict and protect sensitive data.

- **Regulatory Compliance:**

Collaborate with legal and compliance teams to align AI interactions with industry-specific standards and ethical guidelines.

- **Regular Security Audits:**

Periodic assessments help identify vulnerabilities, update policies, and ensure adherence to evolving regulatory requirements.

For organisations in highly regulated industries, proactive measures—such as maintaining detailed audit trails and integrating automated compliance checks—can provide additional layers of protection. A robust security framework ensures that Agentforce operates ethically, transparently, and with the utmost reliability.

System Compatibility and Integration Tools

Seamless integration with your existing infrastructure is a hallmark of Agentforce, but ensuring compatibility during the initial setup phase is crucial. Several key tools and components play a critical role in enabling Agentforce to function optimally:

- **Salesforce Flows:**

These low-code tools power automation, enabling AI agents to retrieve, process, and update data efficiently. Configuring Flows to align with your organisation's specific logic and data requirements ensures consistency and scalability.

- **API Readiness:**

APIs enable real-time data exchange between Agentforce and third-party platforms, supporting complex workflows such as synchronising CRM records with inventory or billing systems.

- **Middleware Solutions:**

Platforms like MuleSoft streamline multi-system integration by connecting disparate data sources, ensuring a unified flow of information across departments.

Addressing these elements during setup ensures that Agentforce can interact seamlessly with all relevant systems, creating an environment where automation thrives.

Testing, Validation, and Resilience

Before deploying Agentforce at scale, rigorous testing is essential to ensure its performance

aligns with your organisation's expectations. Using sandbox environments allows you to simulate real-world conditions, validate workflows, and identify potential issues before they impact live operations. Engaging cross-functional teams in the testing process ensures alignment between technical capabilities and business objectives.

Building resilience into your infrastructure is equally important. Establish processes for **monitoring system health**, maintaining backups, and establishing rapid escalation paths for addressing critical failures. A robust incident management framework ensures your organisation can quickly address any disruptions, minimising downtime and preserving customer trust.

Preparing for Long-Term Success

Establishing a well-planned and adaptable technical infrastructure is more than a prerequisite for Agentforce deployment—it's an investment in your organisation's future. By prioritising data integration, scalability, and security, you create a foundation that supports advanced AI capabilities while maintaining operational resilience. Working closely with trusted partners like Sirocco can further streamline this process, providing expert guidance to align your technical environment with Agentforce's requirements.

With the right infrastructure in place, your organisation can fully embrace the transformative potential of Salesforce Agentforce, driving efficiency, enhancing customer experiences, and scaling to meet future challenges with confidence.

Agentforce Pricing and Licensing Model

Understanding the pricing and licensing structure of Salesforce Agentforce is crucial for organisations planning to integrate this AI-driven platform into their operations. Agentforce offers a flexible, consumption-based pricing model designed to accommodate businesses of varying sizes and needs. However, as pricing details may evolve, it's advisable to confirm the latest information with your Salesforce Account Executive.

Consumption-Based Pricing

Agentforce employs a consumption-based pricing model, charging \$2 per conversation. A conversation is defined as an interaction initiated by a customer, such as sending a message or selecting a menu option, and spans up to 24 hours. Each conversation is capped at 200 Einstein Requests, though the average usage per conversation is typically lower, keeping costs predictable.

For organisations using Salesforce's Enterprise Edition, the first 1,000 conversations per year are included, offering a cost-effective way to test and refine workflows before scaling. Volume discounts may be available for businesses with high interaction volumes, making it feasible to manage costs as adoption grows.

Data Cloud Credits

In addition to conversation-based pricing, organisations leveraging the Salesforce Data Cloud receive 250,000 Data Services credits annually as part of the Enterprise Edition. These credits are used for data storage, processing, and integration, supporting real-time analytics and personalised AI-driven interactions. Efficient credit management is essential for optimising costs, and additional credits can be purchased as needed to accommodate larger data volumes.

Licensing Flexibility

Agentforce's modular licensing structure allows organisations to adopt the components they need most, such as Data Cloud, Einstein AI, or other Salesforce services, without unnecessary dependencies. This flexibility ensures that businesses can scale their investment incrementally while prioritising features that deliver the greatest value.

By understanding and strategically managing these pricing components, organisations can effectively leverage Agentforce to enhance customer interactions and operational efficiency while maintaining control over costs.

There is a maximum number of agents you can deploy per org. But don't give into the temptation of building too generic super agents. They should each serve a specific purpose and topic. Speaking of topics, here are some best practices for agent topics.

Agent topics are an essential framework for guiding agents and Copilot in handling specific tasks. They categorise actions and instructions into well-defined groups, tailored to the jobs the agent is designed to perform. These topics serve as the blueprint for what the agent can handle, enabling businesses to streamline user interactions. While Salesforce offers a library of standard topics for common use cases, organisations have the flexibility to create custom topics that address their unique business requirements.

To ensure reliable performance, it is vital to embed sensitive or deterministic business rules directly into the logic of an action rather than relying on instructions within a topic. Instructions, being interpreted

by large language models (LLMs), are inherently nondeterministic and prone to varied outcomes. For instance, rather than instructing an agent with a rule like "Don't refund an order unless it was within 30 business days," the better approach is to build a flow-based action that automatically assesses refund criteria. This distinction ensures that critical rules are adhered to without ambiguity or misinterpretation.

Developing instructions for agent topics requires a thoughtful and iterative approach. It is often tempting to front-load a topic with detailed instructions to account for every potential edge case. However, doing so can result in unexpected behaviour and make troubleshooting more challenging. Instead, begin with the fewest instructions necessary to enable the agent to perform as intended, and gradually add complexity as you test and refine the topic. Each change should be carefully validated to avoid conflicts with existing instructions, as contradictory guidance can degrade the agent's performance. If the agent struggles to perform consistently, simplifying or reducing the number of instructions can often restore reliable functionality.

Another key consideration is that agents do not automatically understand industry-specific terms or processes, even if they are widely used. For example, terms like "lead qualification," "prospect nurturing," or abbreviations such as "AHT" (average handle time) may not be clear to an agent without explicit guidance. To address this, instructions should define terms in plain language and explain their specific use within the business context. Including examples of user inputs and expected outputs can further enhance the agent's ability to interpret

tasks accurately. Additionally, any expected sequence of actions or conditions that must be met for an instruction to apply should be explicitly detailed, as LLMs do not inherently consider the visual order of instructions in the configuration interface.

The choice of language in instructions plays a significant role in the agent's performance. Using clear, plain, and precise language ensures that the agent interprets the instructions correctly. Overly technical jargon should be avoided, as users interacting with the agent are more likely to use simple terms. Instructions should also maintain consistency in the terminology used to describe actions, processes, and data elements, as inconsistencies can lead to errors or unpredictable behaviour. When strong language such as "always" or "never" is used, it should be applied with caution, as agents interpret absolutes strictly.

When building your own agent, topics need to be clear, and descriptions need to be thoughtful. Your classification description must be sufficient for the agent to figure out if the current conversation is on topic. Agent topics define the capabilities of agents by grouping actions and instructions into coherent categories. To optimise their functionality, businesses should integrate deterministic rules into the actions themselves, use minimal and iterative instructions to refine performance, and provide clear, consistent language that bridges the gap between user expectations and agent behaviour. By adhering to these principles, organisations can ensure that their agents deliver reliable and effective assistance tailored to their specific needs.



Team and Organisational Readiness for Agentforce

Successful implementation of Salesforce Agentforce extends beyond technical setup—it requires a cohesive team with the right skills, a clear strategy for collaboration, and a culture that embraces AI-driven innovation. By assembling a capable team and fostering organisational readiness, you can maximise the platform's impact.

Roles and Expertise

Implementing Agentforce requires collaboration across multiple functions. Key roles and their responsibilities include:

- **Salesforce Administrators:**

These professionals manage system configurations, user permissions, and integration points. Their expertise in Salesforce Service Cloud, Customer 360, and Data Cloud is critical to ensuring that Agentforce aligns with your existing infrastructure.

- **Data Analysts and Data Scientists:**

These team members oversee data preparation and analytics, ensuring that datasets are accurate, actionable, and optimised for AI interactions. Their work enables Agentforce to deliver insights that drive decision-making and efficiency.

- **AI Specialists:**

AI experts fine-tune the platform's models, ensuring that Agentforce agents operate effectively and ethically. They collaborate with data teams to optimise workflows and adapt AI capabilities to evolving business needs.

- **Customer Support Managers:**

These leaders design workflows, oversee escalations, and ensure that teams are equipped to work alongside AI agents. They act as the bridge between technical teams and front-line staff.

Training and Skill Development

Equipping your team with the necessary skills to operate Agentforce is a foundational step in the implementation process. Comprehensive training programmes should focus on both technical and operational aspects, such as:

- Understanding how to interpret AI-driven insights and recommendations.
- Managing workflows that blend automated and human-driven tasks.
- Using tools like Salesforce Flows and Prompt Builder effectively.

Salesforce's Trailhead platform provides valuable training resources, including certifications for Service Cloud and AI-specific modules. Ongoing education ensures that your team remains current with Agentforce updates and best practices.

Cross-Functional Collaboration

The success of Agentforce hinges on collaboration between technical teams and business units. Aligning goals and expectations across departments creates a shared vision for how AI will enhance operations. Regular cross-functional meetings can help identify potential roadblocks, share insights, and ensure that workflows are cohesive and aligned with organisational objectives.

Change Management

Introducing AI-powered agents requires a cultural shift within your organisation. Employees may have concerns about how AI will impact their roles, particularly around job security or adapting to new workflows.

Address these concerns proactively by emphasising how Agentforce will empower teams rather than replace them. Transparent communication is key. Share clear examples of how Agentforce will enhance productivity, free up time for higher-value tasks, and improve customer experiences. Engage employees at all levels in the process, gathering feedback and addressing questions to build trust and confidence.

Building Long-Term AI Maturity

Agentforce is not a static tool—it evolves with advancements in AI and changing customer expectations. To maintain long-term success, invest in developing your organisation's AI maturity. This involves fostering a culture of continuous improvement, regularly evaluating workflows, and exploring new use cases as the platform's capabilities expand. Establishing an internal AI centre of excellence can help drive innovation and ensure that AI remains a strategic priority. This team can monitor emerging trends, pilot new features, and share best practices across the organisation.

By preparing your teams and fostering an AI-ready culture, you position your organisation to unlock the full potential of Salesforce Agentforce. This alignment of technical, operational, and cultural readiness ensures that the platform delivers meaningful and sustained value across your operations.

Best Practices for Maximising Agentforce's Impact

Implementing Salesforce Agentforce is only the first step. To ensure the platform delivers sustained value and measurable results, it's essential to follow best practices that optimise its use across your organisation. These practices focus on data quality, workflow design, training, and continuous improvement.

Maintain High-Quality Data Standards

Agentforce's effectiveness relies heavily on the quality of your data. Inconsistent, outdated, or incomplete information can hinder its ability to deliver accurate and personalised interactions. Establishing robust data governance policies ensures that your AI agents operate with reliable information.

Regular audits and validation processes help maintain data accuracy, while periodic clean-ups eliminate redundant or obsolete entries. For organisations with high data volumes, managing Data Cloud credits efficiently by archiving non-critical data ensures uninterrupted operation without unnecessary costs.

Design Clear and Flexible Workflows

A well-structured workflow is critical for balancing automation with human oversight. Begin by mapping customer journeys to identify touchpoints where automation can deliver the most value. Tasks that are routine and high-volume, such as order tracking or FAQs, are prime candidates for automation, while complex or high-stakes scenarios should involve human agents.

Salesforce Flows allows you to design workflows that reflect these distinctions, incorporating clear escalation paths for seamless transitions between AI and human agents. Regularly reviewing and refining these workflows ensures they remain aligned with evolving business needs.

Foster Collaboration Between Teams

The integration of Agentforce into your organisation requires collaboration between technical teams, front-line staff, and leadership. Clear communication about how the platform works and the benefits it brings ensures alignment and collective buy-in. Cross-departmental training sessions and feedback loops help identify and resolve issues, making workflows more efficient and cohesive.

Invest in Ongoing Training

Continuous learning is key to staying ahead in a rapidly evolving AI landscape. Equip your teams with the knowledge to use Agentforce effectively through comprehensive training programmes. Salesforce's Trailhead certifications are an excellent starting point, covering topics such as Service Cloud, data analytics, and AI capabilities.

Encourage your teams to stay updated with new features and use cases. Internal workshops or dedicated AI champions within your organisation can help disseminate knowledge and foster a culture of innovation.

Regularly Monitor and Optimise Performance

Agentforce provides robust analytics tools that enable you to track key performance indicators (KPIs) such as customer satisfaction, resolution times, and cost-efficiency. Use these insights to identify areas for improvement and refine workflows continuously. Regular performance reviews and feedback sessions with your teams ensure that the platform adapts to changing customer expectations and business goals.

Ensure Ethical and Responsible AI Use

The Einstein Trust Layer provides a secure and ethical framework for AI interactions, but your organisation must complement this with its own policies. Regularly review workflows for potential biases, ensure transparency in decision-making, and maintain clear audit trails for compliance. By addressing these considerations, you build trust with your customers while aligning with broader ethical standards.

Embrace Incremental Innovation

Agentforce is a dynamic platform that evolves with Salesforce's ongoing advancements. To maximise its potential, stay informed about new features, expanded capabilities, and upcoming enhancements. Pilot emerging functionalities to explore new use cases, such as expanding automation into sales or marketing processes, and integrate these insights into your long-term strategy.

Follow these best practices and you can optimise Agentforce's performance and embed its capabilities deeply into your organisation's operations. This proactive approach ensures that the platform remains a strategic asset, delivering meaningful results now and into the future.

Good Use Cases and Less Effective Scenarios for Agentforce

When deciding how to implement Salesforce Agentforce, understanding its strengths and limitations is crucial. The platform excels in certain areas where automation provides significant value, but other scenarios may require human expertise to achieve the desired outcomes. Here, we outline examples of when and where Agentforce is most effective, as well as situations where human intervention is indispensable. This is meant to get you thinking beyond some of the examples we provided earlier.

Ideal Scenarios for Automation

Agentforce thrives in tasks that are repetitive, structured, and high-volume. These scenarios allow the platform to operate at its best, delivering consistent, accurate, cost effective, and efficient results.

1. Routine Customer Inquiries

Simple queries such as order statuses, account balances, and frequently asked questions are perfect candidates for automation. Agentforce can provide instant responses by accessing relevant data, improving response times while reducing the workload on human agents.

2. Basic Claims and Reimbursements

Low-value claims, such as refunds within set thresholds or reimbursements for minor billing discrepancies, can be efficiently handled by Agentforce. Automation ensures consistent decision-making and reduces operational costs for high-volume, low-risk cases.

3. Loyalty Programme Management

Managing customer loyalty accounts, including points tracking and redemption, is another area where Agentforce excels. By integrating with CRM systems, it can process inquiries and transactions seamlessly, providing customers with a personalised experience.

4. Service Appointments and Scheduling

Automated handling of appointment bookings and updates simplifies workflows for both customers and support teams. Agentforce can streamline the process by confirming details, sending reminders, and flagging scheduling conflicts.

5. Order Processing and Product Returns

Tasks such as processing standard returns or handling exchanges within predefined policies can be automated effectively. By defining clear rules and thresholds, Agentforce ensures that these interactions are resolved quickly and accurately.

Scenarios Requiring Human Expertise

While Agentforce is a powerful tool, there are certainly instances where human agents are better suited to handle interactions, at least for now. These often involve complex, emotionally sensitive, or high-value tasks. Here are some examples.

1. Complex or High-Stakes Transactions

Cases involving significant financial value, VIP customers, or intricate account changes require the flexibility and judgment of human agents. These scenarios often demand personalised attention to meet customer expectations and avoid reputational risks.

2. Emotionally Sensitive Interactions

Situations such as healthcare claims, crisis management, or bereavement-related requests require empathy and understanding, which AI cannot replicate. Human agents bring the compassion and reassurance needed to handle these cases effectively.

3. Highly Customised Solutions

For customers seeking bespoke services, such as personalised financial advice or tailored product configurations, human expertise is essential. AI agents can assist by providing background information, but final recommendations and solutions often require a personal touch.

4. Regulatory and Compliance-Heavy Tasks

Cases involving strict regulatory requirements or complex compliance issues, such as financial disclosures or legal documentation, are best handled by human agents. These scenarios demand careful interpretation and meticulous attention to detail.

It's all about finding the right balance – we believe the key to maximising Agentforce lies in deploying automation where it adds the most value and relying on human expertise where nuanced decision-making is required. Establishing clear workflows and escalation paths ensures seamless collaboration between AI and human agents, creating a system that is both efficient and customer-focused. By understanding the strengths and limitations of Agentforce, you can align its capabilities with your organisation's goals, delivering operational improvements while maintaining the quality and personalisation your customers expect. We are here to help if you would like to bounce some ideas.



Salesforce Roadmap and Future Enhancements

Salesforce's ongoing commitment to innovation ensures that Agentforce continues to evolve, offering organisations like yours new ways to harness the power of AI and data. Staying informed about these advancements allows you to align your strategy with the platform's capabilities, ensuring your investment delivers value both now and in the future. Salesforce's vision for the coming years underscores the increasing role of trusted data and AI in transforming business operations and customer experiences.

One major area of focus is Salesforce's emphasis on integrating AI and trusted data to drive business innovation. As we approach 2025, AI is set to become the cornerstone of operations for forward-thinking organisations. By combining advanced predictive analytics, dynamic contextual reasoning, and intuitive automation, Salesforce aims to enable businesses to adapt quickly, outpace competition, and deliver more personalised customer engagements. For Agentforce users, these developments will translate into even more sophisticated tools for managing workflows and enhancing productivity across departments.

Expanding language support is another significant milestone on Salesforce's roadmap. Currently limited to six languages, Agentforce will soon support a broader range of linguistic capabilities. This expansion ensures that you can deliver culturally relevant, high-quality customer experiences in more regions, breaking down barriers to automation in multilingual markets. For global organisations, this advancement represents an opportunity to unify support operations under a single, scalable platform.

Salesforce is also preparing to introduce new agent types, tailored specifically for marketing and commerce functions. These agents will bring the power of AI to areas such as personalised campaign execution, real-time content generation, and optimised e-commerce workflows. Imagine marketing agents that dynamically adapt messaging based on live customer interactions or commerce agents that guide buyers through complex purchasing decisions with AI-driven precision. These innovations will allow your organisation to extend AI capabilities beyond customer service, creating seamless, cross-functional automation strategies.

Improvements to Agentforce's core features remain a priority as well. Enhanced predictive analytics will empower your team to anticipate customer needs with greater accuracy, while advancements in topic classification will ensure faster, more relevant resolutions for inquiries. The Atlas Reasoning Engine is set to become even more context-aware, enabling it to provide nuanced, human-like responses in increasingly complex scenarios. Together, these updates make Agentforce a platform that can grow with your organisation's evolving needs.

Salesforce's broader vision also emphasises the importance of trusted data, security, and ethical AI. The Einstein Trust Layer plays a pivotal role in ensuring that Agentforce maintains compliance with regulations like GDPR and CCPA while safeguarding against AI biases and misinformation. As data privacy and ethical AI usage become critical concerns for businesses worldwide, Salesforce is committed to maintaining these standards, allowing you to operate with confidence and transparency.

To stay ahead of these advancements, you can access resources that keep you informed and prepared. Salesforce provides a wealth of tools to help you align your implementation with the platform's roadmap:

- **Salesforce Release Notes:**

Regular updates detail upcoming features, enhancements, and availability, giving you a clear view of what's coming next.

- **Salesforce Trailblazer Community:**

Join discussions with peers and Salesforce experts to gain insights into best practices and new capabilities.

- **Salesforce's Roadmap Explorer:**

Explore planned features and their expected release timelines, so you can plan your adoption strategy.

- **Sirocco's Expert Guidance:**

Partner with us to create a forward-looking implementation plan that ensures your workflows and teams are ready for new features the moment they're launched.

By leveraging these resources, you can proactively adapt your workflows, train your teams, and allocate resources to ensure that your Agentforce deployment remains future-proof. Early adoption of these advancements positions your organisation as an innovator, offering superior customer experiences while driving operational efficiency. Salesforce's roadmap demonstrates its ongoing commitment to equipping businesses like yours with the tools to meet tomorrow's challenges head-on. Staying informed and prepared ensures that Agentforce continues to deliver value, helping you maintain your competitive edge in an increasingly AI-driven world.

Conclusion and Next Steps

Salesforce Agentforce represents a transformative step in the evolution of AI, empowering organisations to go beyond basic automation and redefine customer service, sales, and marketing operations. By integrating advanced generative AI with the robust Salesforce ecosystem, Agentforce allows businesses to automate entire workflows, anticipate customer needs, and deliver personalised, context-aware interactions—all while maintaining the flexibility to adapt to new information and challenges. Powered by innovations like the Atlas Reasoning Engine, Salesforce Flows, and the Einstein Trust Layer, Agentforce offers a secure, scalable, and future-ready solution. Throughout this white paper, we've explored how Agentforce's key components work together to transform customer engagement. From automating routine tasks to enabling seamless collaboration between AI agents and human employees, Agentforce equips businesses with the tools to enhance efficiency, improve customer satisfaction, and reduce operational costs. Implementing this platform requires more than just technology—it demands a thoughtful strategy, technical readiness, and alignment across teams to ensure success.

Sirocco: Your Partner for Success

As a trusted Salesforce partner, Sirocco brings deep expertise in configuring, deploying, and optimising Agentforce to meet the unique needs of your organisation. Whether you're navigating the complexities of data integration, setting up workflows, or training your teams to work alongside AI agents, we provide the insights and support you need to make the most of this transformative platform. Our experience spans industries such as manufacturing, telecommunications, retail, and financial services, allowing us to tailor solutions that align with your goals and industry-specific challenges. With Sirocco as your guide, you'll gain the confidence and technical foundation to unlock Agentforce's full potential and position your business as a leader in AI-driven customer engagement.

Taking the Next Step

To fully leverage Agentforce, begin by assessing your organisation's readiness. Evaluate your current workflows, identify areas for automation, and align stakeholders around a shared vision for implementation. A phased deployment strategy—starting with data preparation, technical setup, and pilot testing—will help ensure a smooth rollout and measurable results. We invite you to connect with Sirocco's team of Salesforce-certified experts to design a tailored roadmap for your Agentforce journey. Together, we can transform your customer support operations, enhance your business efficiency, and position your organisation for sustained success in an AI-driven future.

 salesforce@siroccogroup.com

Appendix: Unlocking the Power of Agentforce 2.0

Salesforce Agentforce has rapidly become a cornerstone of AI-driven automation within enterprise workflows. Since its launch less than six months ago, Agentforce has empowered organisations to streamline operations, enhance customer experiences, and drive efficiency across various teams. With the introduction of Agentforce 2.0, Salesforce is taking AI-powered automation to the next level, delivering a suite of enhanced features designed to meet the evolving demands of modern enterprises. This evolution aligns with Salesforce CEO Marc Benioff's ambitious vision: to deploy one billion AI agents within a year. As hundreds of organisations already leverage the platform's capabilities, Agentforce 2.0 expands its reach and capabilities, setting a new standard for enterprise automation.

This appendix explores Agentforce 2.0's key enhancements, features, and opportunities and how organisations like yours can unlock agentic AI's full potential to achieve transformative business outcomes.

Generative AI vs. Agentic AI

Generative AI has already been transformative, enabling businesses to create outreach emails, source code, marketing strategies, and more. However, it typically requires human activation and decision-making to implement its outputs effectively.

Agentic AI, such as Agentforce, goes further by focusing on autonomous execution - moving beyond content creation to actively drive business outcomes. Imagine generative AI drafting an outreach email for a sales lead. An agentic AI, in contrast, would autonomously send the email, track the recipient's response,

and schedule a follow-up meeting. Similarly, while generative AI might design a marketing campaign, agentic AI could implement it by deploying ads, monitoring performance, and reallocating budgets in real time.

By executing tasks without constant human prompts, agentic AI transforms industries. For example, it could independently manage customer onboarding, from account creation to scheduling meetings - tasks that previously required significant human effort. While generative AI produces valuable outputs, agentic AI directly reduces human costs and enhances efficiency, delivering measurable business value.

Key Enhancements in Agentforce 2.0

Agentforce 2.0 introduces a suite of significant enhancements that broaden its capabilities and expand its applicability across diverse enterprise workflows:

- **Expanded Skills Library:**

A robust collection of pre-built workflows and integrations now supports tools like CRM, Slack, Tableau, and MuleSoft, reducing setup time and enabling faster deployment across departments.

- **Deep Slack Integration:**

AI agents can now operate seamlessly within Slack, allowing teams to assign tasks, receive updates, and interact with AI directly within their communication platform.

- **Enhanced Atlas Reasoning Engine:**

Updates to the Atlas Reasoning Engine enable it to handle complex, multi-step workflows with greater sophistication, addressing intricate operational challenges.

- **Robust Testing Centre:**

A dedicated environment for testing and refining AI agents before deployment ensures optimal performance and alignment with business needs.

- **Natural Language Agent Building:**

Non-technical teams can create and customise AI agents using plain-language instructions, accelerating adoption and reducing reliance on technical expertise.

- **Seamless MuleSoft Integration:**

Connects Agentforce with a broader range of enterprise systems, enabling automation across HR, supply chain, finance, and more.

- **Enterprise-Wide Automation:**

Expanding beyond CRM workflows, Agentforce 2.0 automates a wider range of business functions, scaling solutions for larger, more complex organisations.



Core Features of Agentforce 2.0

The platform's expanded functionality addresses the increasing complexity of modern enterprise operations while maintaining user accessibility and ease of use. Key features include:

- **AI-Powered Insights:**

Automates complex workflows by transforming raw data into actionable insights, reducing manual effort.

- **Customisable Dashboards:**

Provides unified interfaces for tracking metrics, managing workflows, and accessing critical data.

- **Omni-Channel Support:**

Ensures consistent, context-aware customer interactions across email, social media, live chat, and voice.

- **Integrated Knowledge Base:**

Empowers agents with real-time access to

company policies, FAQs, and troubleshooting guides for faster responses.

- **Enhanced Reporting and Analytics:**

Delivers insights into response times, resolution rates, and customer satisfaction, optimising team performance.

- **Seamless MuleSoft Integration:**

Extends connectivity across logistics, finance, and other critical functions.

- **Robust Testing Centre:**

Reduces deployment errors by refining AI agents through rigorous pre-deployment trials.



Agentforce: Ambition, Impact, and Practical Considerations

Salesforce Agentforce represents a bold leap forward in customer support and workflow automation. Marc Benioff's vision to deploy one billion AI agents within a year underscores the platform's transformative potential for productivity and economic growth. Early adopters are already realising tangible benefits, with Agentforce enhancing efficiency, delivering personalised customer experiences, and enabling data-driven decisions. Salesforce's investment in expanding its AI-focused team by 2,000 professionals ensures businesses have the guidance needed to succeed.

The Impact of Agentforce 2.0 on the Salesforce Ecosystem

Agentforce 2.0 is reshaping how organisations operate within the Salesforce ecosystem. By combining advanced reasoning capabilities with seamless integration and user-friendly interfaces, it empowers businesses to scale AI adoption, reallocate resources to high-value tasks, and improve customer satisfaction. As more organisations adopt Agentforce, its data pool and best practices expand, enhancing the platform's effectiveness and strengthening Salesforce's leadership in AI-powered solutions.

Hypothetical Use Cases: Agentforce 2.0 in Action

To illustrate the transformative potential of Agentforce 2.0, consider these hypothetical scenarios:

1. Customer Support Revolution:

An AI agent autonomously manages a support case, diagnosing the issue, identifying relevant knowledge base articles, and scheduling a technician for complex resolutions.

2. Sales Pipeline Acceleration:

A sales team leverages AI agents to identify high-priority leads, send personalised outreach, and schedule follow-ups, ensuring no opportunity is missed.

3. Proactive Customer Retention:

AI agents monitor account activity to detect declining engagement, automatically reach out with tailored offers, and schedule retention calls to reduce churn.

4. Dynamic Inventory Management:

A retail enterprise automates supply chain operations, with AI agents tracking inventory levels, reordering stock, and rerouting deliveries to optimise logistics.

5. Cross-Functional Alignment:

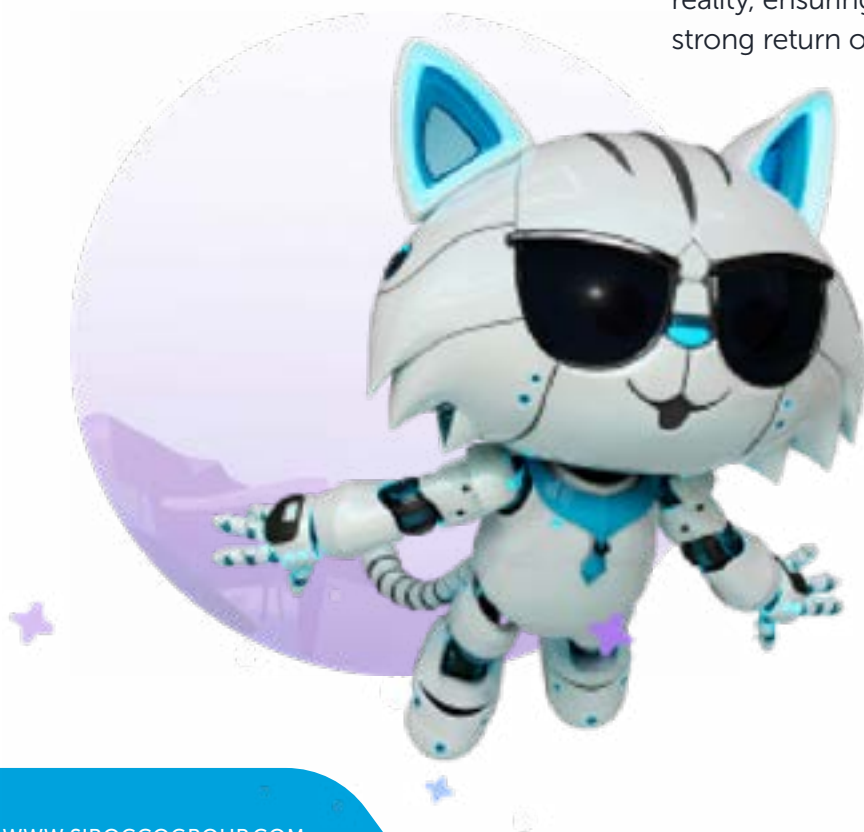
Teams across HR, finance, and operations rely on Agentforce to execute interdependent workflows, from payroll processing to onboarding, minimising silos and maximising efficiency.

Turning Vision into Reality with Trusted Partners

While Agentforce offers transformative capabilities, realising its full potential requires a strategic approach that includes thoughtful implementation, seamless integration, and ongoing optimisation. Salesforce's trusted partner ecosystem, including Sirocco, brings invaluable expertise to:

- Overcome technical challenges and ensure smooth integration with existing systems.
- Align workflows with strategic objectives, ensuring AI solutions enhance business goals.
- Maintain high data quality, optimising AI effectiveness.
- Tailor solutions to unique organisational needs and industry best practices.

By partnering with Sirocco, you can bridge the gap between technology and operational reality, ensuring measurable outcomes and a strong return on investment.



Your Next Steps

Agentforce presents an unprecedented opportunity to modernise workflows, enhance customer experiences, and achieve operational excellence. Its success, however, depends on a clear vision, robust data, and effective training. At Sirocco, we partner with organisations to turn the promise of Agentforce into measurable results. From strategic planning to deployment and continuous improvement, we ensure every step aligns with your business objectives. Ready to explore how Agentforce can transform your operations?

Contact Sirocco for a personalised demo at siroccogroup.com or connect with us on LinkedIn to start the conversation.

✉ salesforce@siroccogroup.com



